NASA Incident Reporting Information System (IRIS)

Training Guide:
Ex3 EHS Data Management System / IRIS (Ex3 EHSDMS)

Administrator Version

Powered and Delivered by
Ex3®

Environmental Health and Safety Data Management System
Introduction to Ex3® EHSDMS

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Ex3®

Efficient Enterprise Engineering, Inc.
Worldwide Corporate Headquarters
1380 Auto Drive
Tempe, Arizona 85283
Phone: (888) 460-7874
Fax: (480) 756-9393
www.ex3.com
quality@ex3.com

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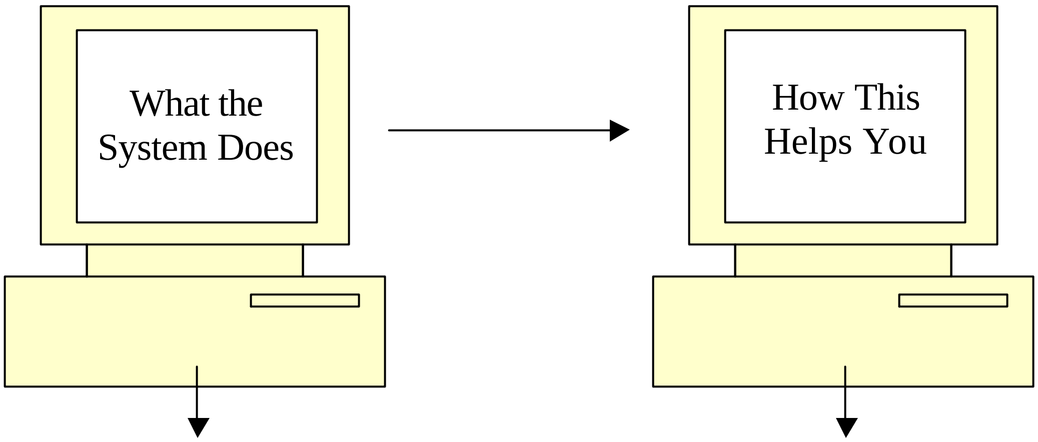
Advantages of the System

Ex3 EHSDMS is one of the best health and safety applications in the industry. This application is a replacement of the current IRIS system and will be utilized throughout the agency. The chart below illustrates how this release, which has been specifically tailored to NASA's needs, will make your work-life easier.

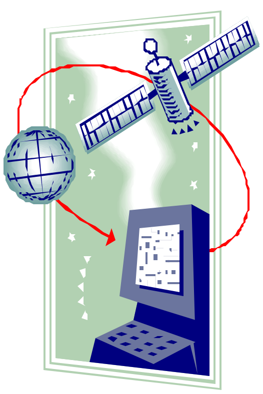


The system makes liberal use of required fields during data entry. Case files cannot be saved until these required fields are filled.	You won't have injury/illness case files that consists of only the employee's name and injury date.
The system distributes data throughout the application, reducing or eliminating the need for repetitious data entry.	You won't have to look up the same employee multiple times for the same case file.
The system's modular design allows the application to grow along with NASA.	New modules will be similar in format and therefore easier to train on.
Only approved users are allowed access to the system's functions and data through the login procedure with NT Integrated Security.	Employee data and privacy are protected.
The system's security protocols allow authorized users to access the application on any computer or laptop.	You can work wherever it is most convenient for you.

Notes

Module Overview

This release of the system consists of seven modules designed to capture a variety of environmental, health and safety information. Below is a general overview of these modules.



Module	Overview
Injury Illness	**Case: New**– Create a new case. **Case: Find** - Search the system for a case to review or edit. **Visit: New** - Create a new medical visit for an existing injury/illness case. **Visit: Find** - Search the system for a medical visit to review or edit. **Reports** – Create various OSHA reports, Daily Logs, Case Counts, Work Loss, and Indicators.
Action Request (AR)	**Create** – Create a new AR in stand-alone mode, not attached to a specific case file. **Manage** – Review, reassign or distribute ARs on your list. **Distribution List** – Create lists of employees who are often notified of ARs at the same time. **Reports** – Create reports for analysis of AR indicators.
Safety Incident	**New** – Create a new safety incident. **Find** – Search the system for a safety incident to review or edit. **Reports** – Create daily logs and Indicator reports.
Employee	**New** – Create a new employee record. **Find** – Search the system for a specific employee's record.
Headcount	**Manage** – Input contractor and civil servant man-hours
Administration	**Manage Users** – Specify and define user information including roles. *User Roles* control the level of user access to the functions of the system. **Ref. Table Maint.** – Review or edit the charts used to store the records that fill drop-down menus or lists. **Manage Contract** – Review or edit the charts that store contract information used to fill drop-down menus or lists. **Sync Employees** – Match orphaned legacy records with current employees.
General	**Home** – Return to the homepage. **My Permissions** – View your system roles and assigned sites, organizations and medical office **Change Password** – Change your password. **Logout** – Exit the system to prevent unauthorized use of system.

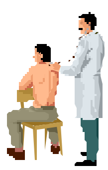
Why Have Separate Modules?

To understand how the system works it is important to understand the relationship between an injury or illness case and a safety incident.

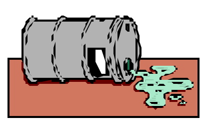
Injury/Illness case: Involves either an injury or illness to an individual.
Safety Incident: Any event that requires investigation by safety professionals. This event may or may not have resulted in an injury to a person(s).

Since injury/illness cases and safety incidents contain separate information, they have been separated into two different modules. Below are several reasons why the system is laid out this way.

Separation of these areas conforms with industry best practices, where in house medical professionals enter first hand information directly and specify the correct level of privacy, while safety professionals enter first hand investigation findings on hazard condition and abatement measures.



Not all injuries or illnesses require an occupational safety investigation.



Not all safety incidents involve an injury or illness.

OSHA report requirements separate the two categories.

Notes

Accessing the Site

The URL you will be using to access the application varies depending on your site's step in the IRIS replacement process. If your site is beginning its beta test phase, you will need to use the URL under the "Beta Testers" heading. If, however, your site has completed its beta test phase and is going live, use the URL under the "Live Users" heading. Be aware that the live version is "for real"; no fictitious information should be entered.

Beta Testers → **https://ca.ex3host.com/ex303210**

Live Users → **https://nasa.ex3host.com/Iris**

Notes

The Security Pop-Up

Each time you enter the URL for this application the pop-up shown below appears. Its purpose is to inform users that Ex3 EHSDMS will be creating a private encryption from its secure server to your browser. Once you agree to proceed, you will be working in a secure environment.

Click the **Yes** button to proceed loading the application.

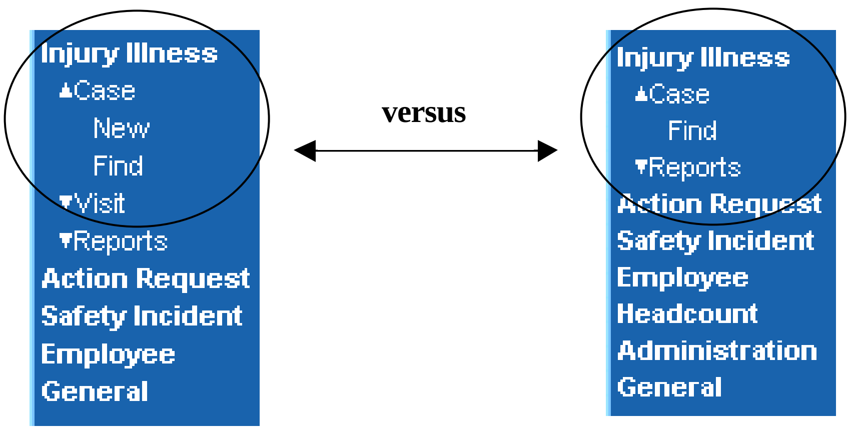
Notes

Understanding Assigned Roles

In order to maintain data integrity and privacy, it is important to limit access to some of the menu options and tabs within the system. Therefore, each user of the system is assigned a “role(s)” when added to the user list. This role determines which menu items and/or tabs will be visible or in some cases read only upon login. If your assigned role(s) does not allow you access to items needed for your job, contact your site system administrator.

For more information on privileges assigned for each user role see the NASA EHSDMS SECURITY MATRIX beginning on page 161

An example of how the menu options available to a user change based on user role.



Medical User Role　　　　Safety User Role

Contractors
Contractors may only view information for the contractor to which he/she is assigned. This means that all reports, find screens and drop-down boxes will only return their contractor records.

NASA Employees
NASA employees are allowed access to all information, including contractor data, within the system based on their security roles.

Notes

Getting Help

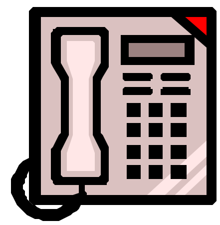
While the aim of this training is to make you an independent user of the system it is possible that you may need help afterward. E*x*3 has established a helpdesk to assist users with any questions they may have pertaining to the use of the current application. Its hours of operation are listed below. While the helpdesk is there to assist you, consider first contacting your site system administrator or POC. In most cases they will be able to help you resolve any problems you may be having.

Hours of Operation

Monday - Friday

8 am to 8 pm EST

1-888-460-7874 ext 208



Note: Any suggestions for improvements or enhancements to the current application should be routed through your site system administrator.

The E*x*3 Helpdesk is not designed to handle programmatic and/or policy issues. These types of issues should go through Suzanne Otero's office. Her contact information is listed below.

Suzanne L. Otero, IRIS NASA Program Manager
NASA Assurance Technology Center
440-962-3106
22800 Cedar Point Road
Cleveland, Ohio 44142

Notes

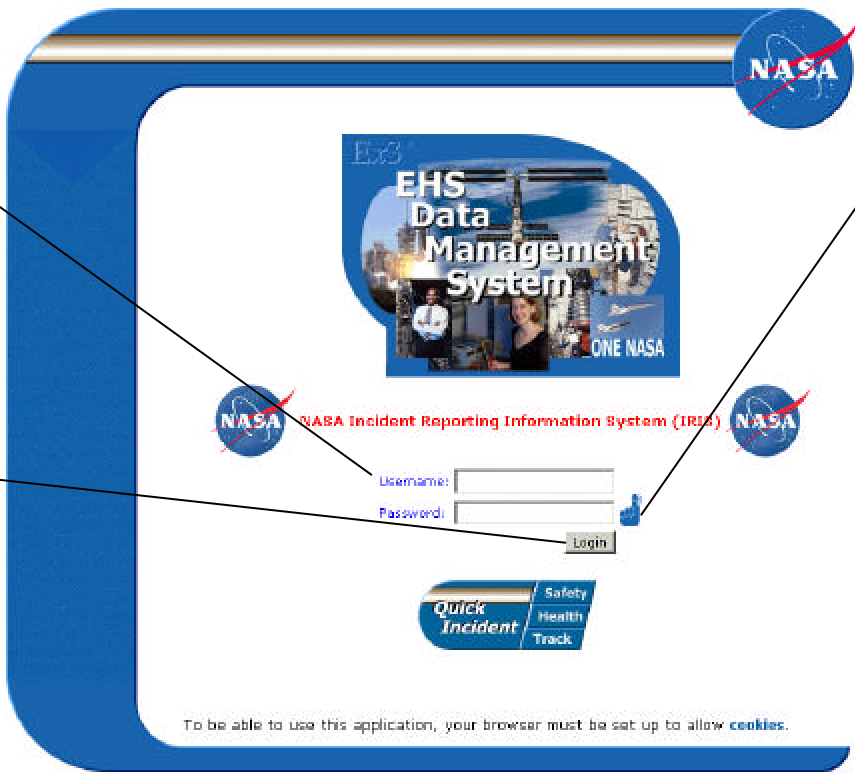
Logging In

To log into the system enter your user name and password and click the **Login** button. If you do not have a user name and/or password you need to contact your site system administrator. As part of the security requirements plan, you are required to change your password periodically.

For more information on changing your password see CHANGING YOUR PASSWORD beginning on page 159.

1. Enter your username and password.

2. Click the **Login** button. The Homepage will display



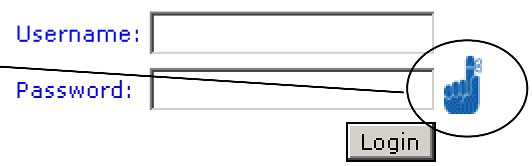
Click the "Reminder" icon to receive your username and password by email. For more information on this feature see USING THE REMINDER ICON on page 13.

Notes

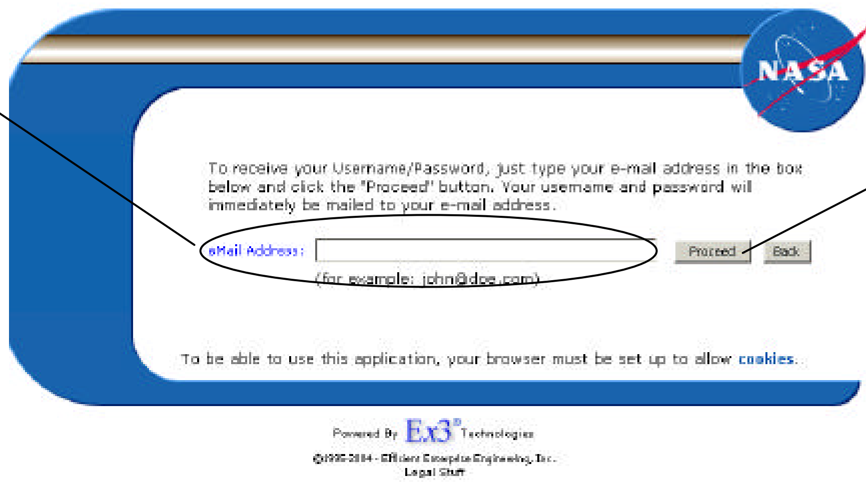
Using the Reminder Icon

If for any reason you forget your user name and/or password, you may obtain that information using the “Reminder” icon that is located to the right of the login fields. Once the email reminder process is initiated it usually only takes a minute or so to receive a reply.

1. Click the “Reminder” icon. The reminder screen will display.



2. Type in your e-mail address in this field.



3. Click the **Proceed** button. The system will send you your information.

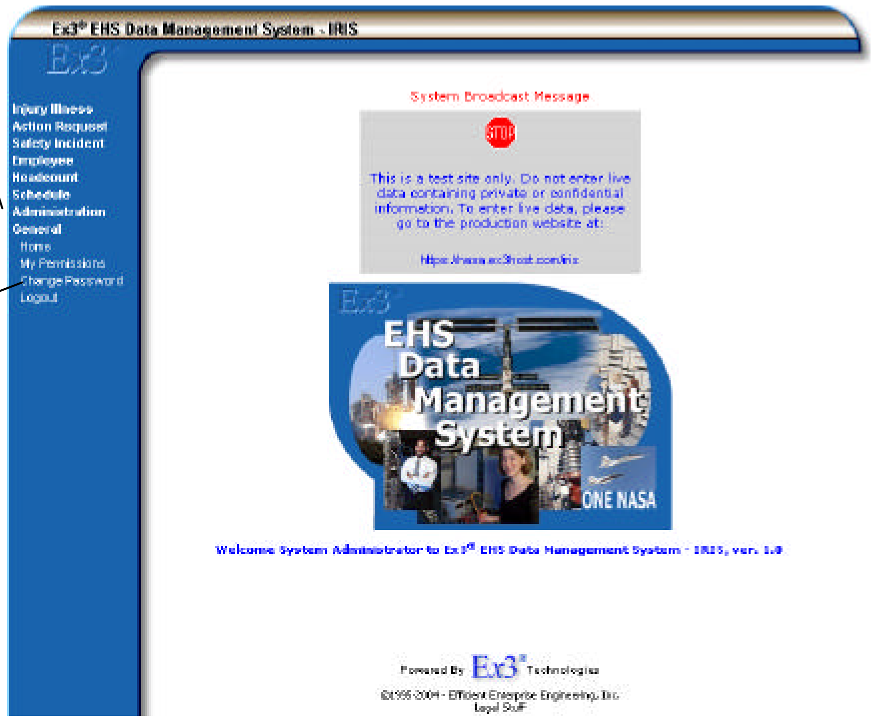
Notes

Logging Out

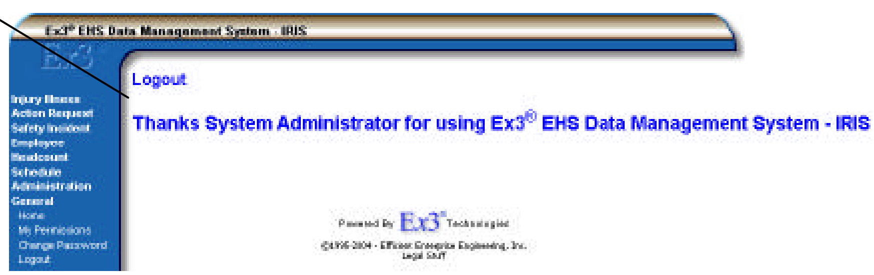
It is important to always remember to logout of the system when you have finished your work. This minimizes the possibility of any unauthorized users viewing or accessing confidential or restricted employee information.

1. Click **General** on the menu bar to open the drop-down menu.

2. Click **Logout** under the General menu.



3. This message will display and then the User Login window will open.



Notes

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Opening a New Browser

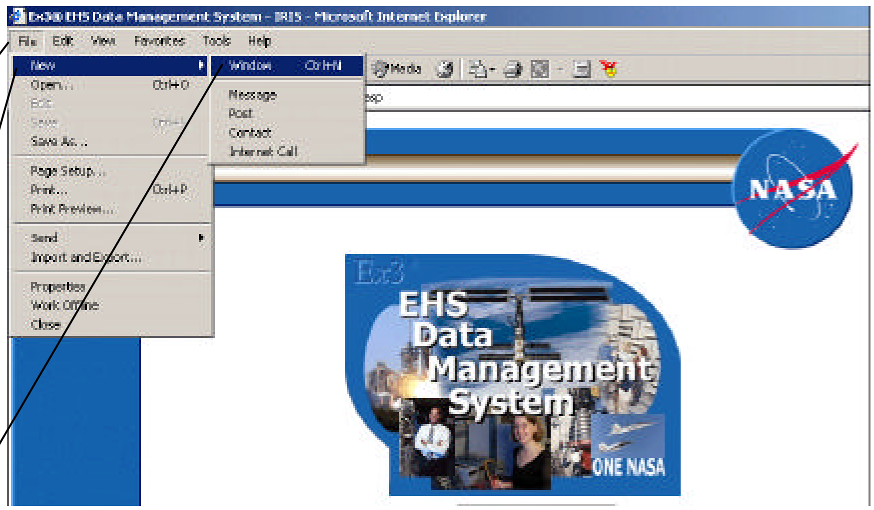
From time to time you may need to add a new employee or update an email address in the system while you are working on an action request or creating a case or incident. You can make these changes more easily by opening a new browser window.

You may open a new browser in two ways; the first is to click **Ctrl-N** on the keyboard. A new window will automatically open with the application open. The second method is described below.

1. Open the File menu on the browser.

2. Click **New** on the file menu to open an additional menu.

3. Click the **Window** option. A new window will open with the application in it.



Notes

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Exploring the Quick Incident Menu

- **Navigating the Quick Incident Screens**
- **Quick Incident Report - Safety**
- **Quick Incident Report – Injury/Illness**
- **Quick Incident Report – Track**

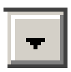
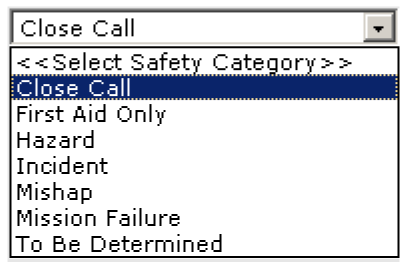
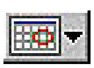
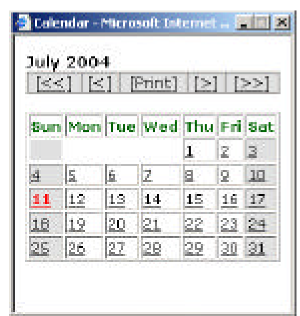
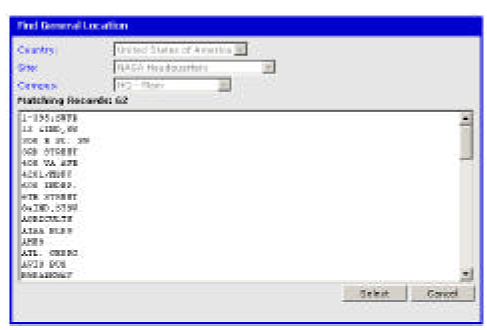
Employees may create “quick” safety and injury/illness incident reports without actually logging in to the system. This quick reporting capability helps ensure that all incidents are entered into the system in a timely fashion. Once the initial report is saved, it can be updated as more information becomes available from within either the Injury/Illness or Safety modules.

To the right is a picture of the Quick Incident menu. Each of the quick incident reports is accessed through this menu, which displays on the login screen.

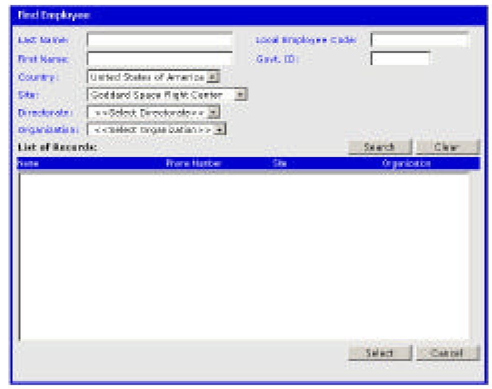
Navigating the Quick Incident Screens

The Quick Incident screens are laid out in a way that allows easy navigation. To move from one field to another press the **Tab** key on your keyboard or click in each field with the mouse. All the required fields are marked with bold labels. Each of the screens requires you to click the **Save** button before exiting the screen. You may not need to fill out every field. However, it is very important to capture as much information as you can in all the fields that do apply. Remember, these records are only as good as the data they contain.

Each screen is made up of a combination of drop-down fields, look-up buttons and free text fields. The table below describes some of the common icons, buttons and fields used in the quick incident screens as well as the application itself.

Icon/Button	Function	Result
	Indicates a drop-down list. Click the arrow to activate the drop-down list. Select an item on the list by clicking on it. The item will automatically fill the field.	
	Click to open the calendar popup window shown to the right. Select the appropriate date by clicking on it. The selected date will automatically fill in the date field. Use the arrows at the top to move forward or back within the calendar. A single arrow will move forward/back a month. A double arrow will move forward/back a year.	
	Click to open the General Location popup window shown to the right. Select the appropriate location by clicking on it. The selected location will automatically fill the General Location field.	

Navigating the Quick Incident Screen cont'd.

	Click to open the Employee Lookup window shown to the right. Supply at least one search criteria. Complete names are not necessary; in most cases 3 characters are enough. Click the **Search** button. The system will return the first 100 matches for you selected criteria. Select the appropriate employee by highlighting them and then click the **Select** button. The selected employee will automatically fill to the appropriate field. For more information on using the find screen see SEARCH TIPS beginning on page 28.	
	This button can appear either next to a field or at the bottom of a page. A clear button next to a specific field clears only that field. A clear button at the bottom of a screen clears all fields.	
	This button returns you to the login screen. (If you are working within the application the cancel button returns you to the Homepage). Be sure to save any new data before using the Cancel button to avoid losing data.	
	This button saves the information entered on the screen. It is necessary to click the Save button each time you enter new information on a screen. The system checks that all required fields have been completed and then notify you that the save was successful.	

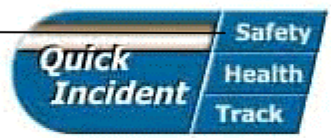
Notes

Quick Incident Report - Safety

The Safety quick incident report is, in most cases, where a safety incident record begins. It is similar to NASA's 1627a reporting form. Since it is located outside of the system, all employees may access it to report incidents. Once the quick incident report is saved, it is assigned an incident number and may be edited or updated within the Safety module.

In some instances, a user may want to report an incident anonymously. To remain anonymous, simply leave the "Recorded By" field empty.

1. Click the **Safety** button on the Quick Incident menu. A report screen will display.



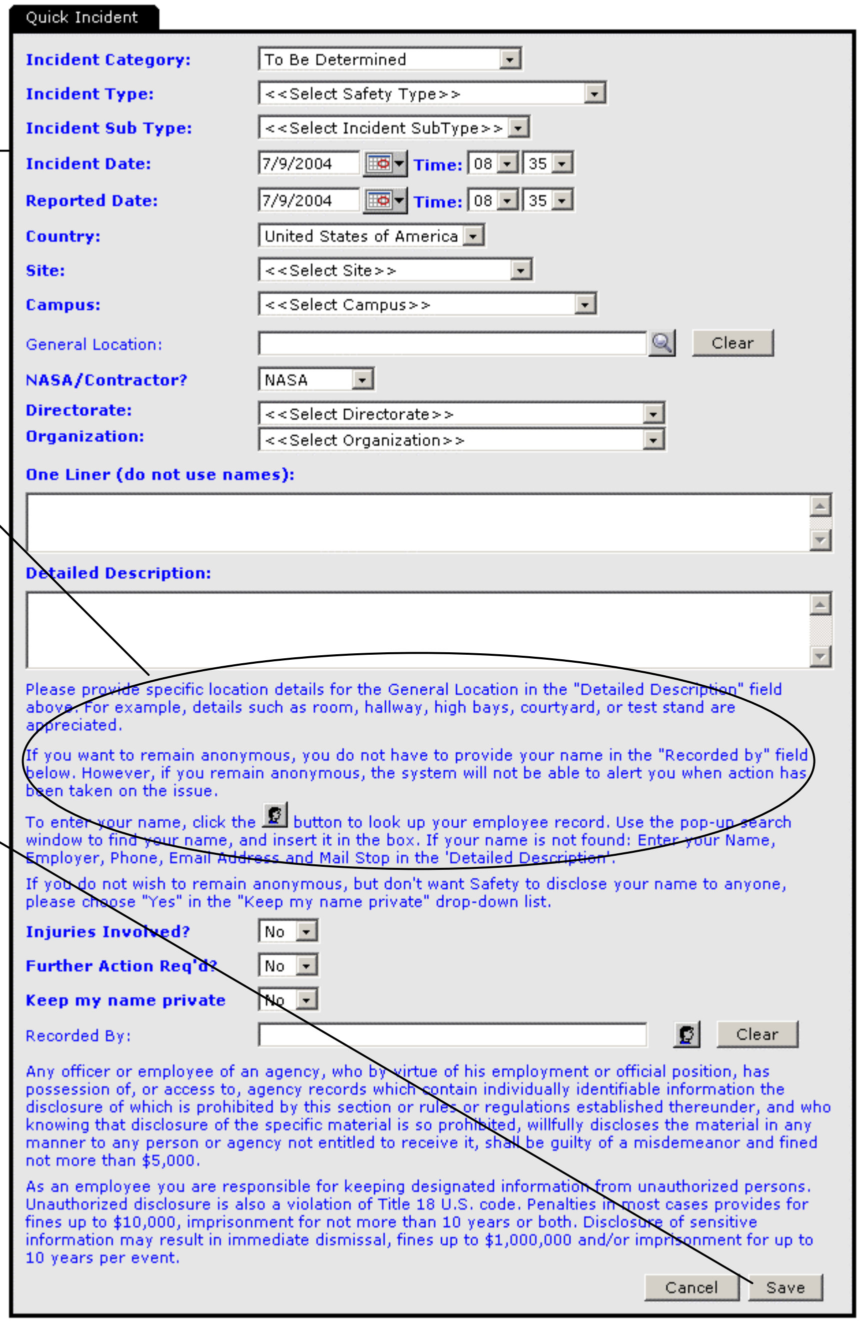
Notes

Quick Incident Report – Safety, cont'd.

2. Complete all required data fields shown in bold blue.

3. Decide if you want to remain anonymous.

4. Click the **Save** button.



Quick Incident

Incident Category: To Be Determined

Incident Type: <<Select Safety Type>>

Incident Sub Type: <<Select Incident SubType>>

Incident Date: 7/9/2004 **Time:** 08 35

Reported Date: 7/9/2004 **Time:** 08 35

Country: United States of America

Site: <<Select Site>>

Campus: <<Select Campus>>

General Location: Clear

NASA/Contractor? NASA

Directorate: <<Select Directorate>>

Organization: <<Select Organization>>

One Liner (do not use names):

Detailed Description:

Please provide specific location details for the General Location in the "Detailed Description" field above. For example, details such as room, hallway, high bays, courtyard, or test stand are appreciated.

If you want to remain anonymous, you do not have to provide your name in the "Recorded by" field below. However, if you remain anonymous, the system will not be able to alert you when action has been taken on the issue.

To enter your name, click the button to look up your employee record. Use the pop-up search window to find your name, and insert it in the box. If your name is not found: Enter your Name, Employer, Phone, Email Address and Mail Stop in the 'Detailed Description'.

If you do not wish to remain anonymous, but don't want Safety to disclose your name to anyone, please choose "Yes" in the "Keep my name private" drop-down list.

Injuries Involved? No

Further Action Req'd? No

Keep my name private No

Recorded By: Clear

Any officer or employee of an agency, who by virtue of his employment or official position, has possession of, or access to, agency records which contain individually identifiable information the disclosure of which is prohibited by this section or rules or regulations established thereunder, and who knowing that disclosure of the specific material is so prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than $5,000.

As an employee you are responsible for keeping designated information from unauthorized persons. Unauthorized disclosure is also a violation of Title 18 U.S. code. Penalties in most cases provides for fines up to $10,000, imprisonment for not more than 10 years or both. Disclosure of sensitive information may result in immediate dismissal, fines up to $1,000,000 and/or imprisonment for up to 10 years per event.

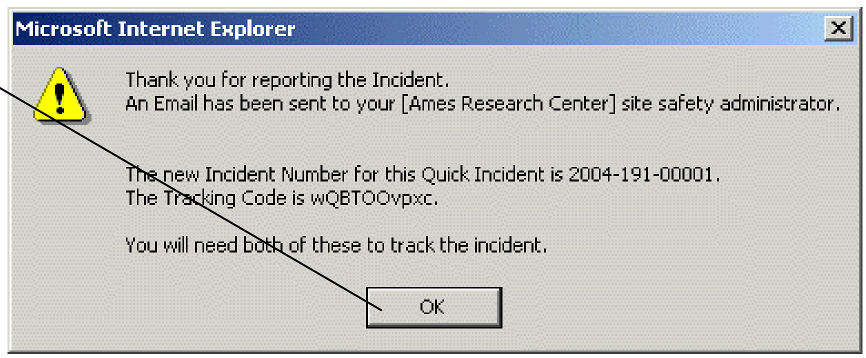
Cancel Save

Notes

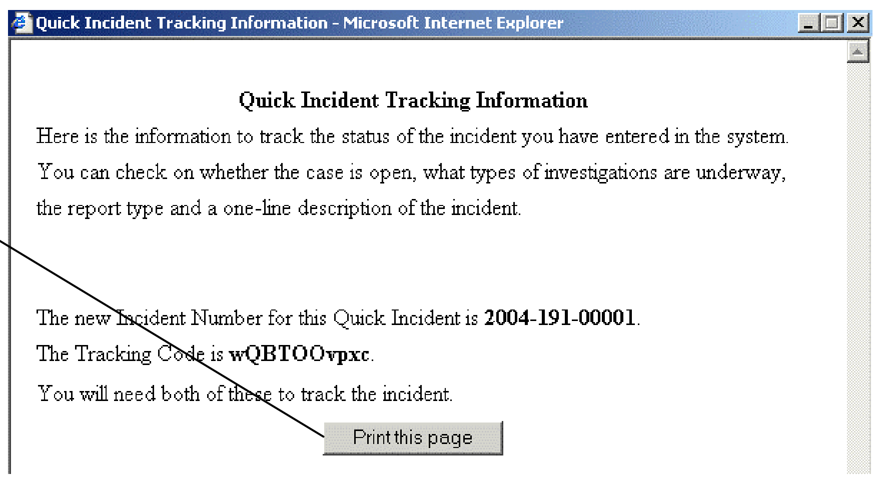
Quick Incident Report – Safety, cont'd.

After you click **Save**, the system generates an incident number and tracking code. You need both to track this incident using the Track feature on the Quick Incident menu. The system generates a second pop-up after you click **OK** that allows you to print a hard copy of the incident's tracking information. In most cases, once you have printed you will be returned to the Login screen. However, if you selected "Yes" for "Injuries Involved?" the system will automatically bring up the Injury/Illness Quick Incident form.

5. This pop-up box gives you the Incident Number and Tracking Code. Click **OK**.



6. Click **Print this page** to print the incident's tracking information.



Notes

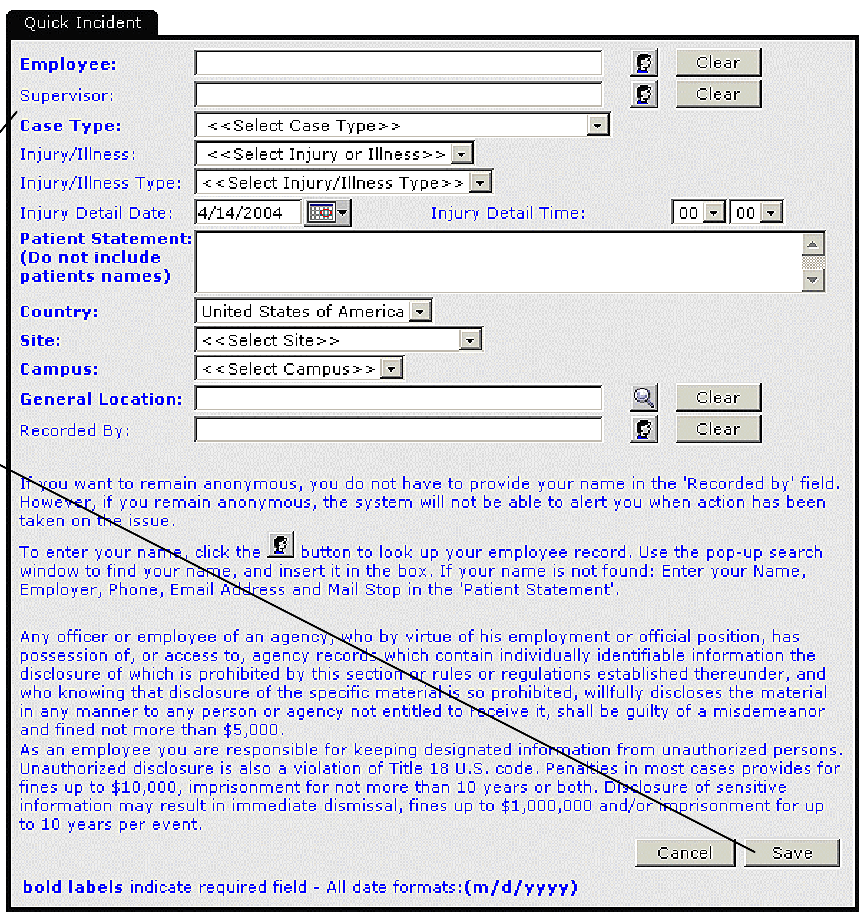
Quick Incident Report – Injury/Illness

Employees may also create "quick" injury/illness case reports without actually logging in to the system. This quick reporting capability helps ensure that all incidents are entered into the system in a timely fashion. Once the quick incident report is saved, it is assigned an incident number and may be edited or updated within the Injury/Illness module.

1. Click the **Health** button on the Quick Incident menu. A report screen will display.

2. Complete as many fields as you can. Fields shown in bold blue are required.

3. Click the **Save** button.



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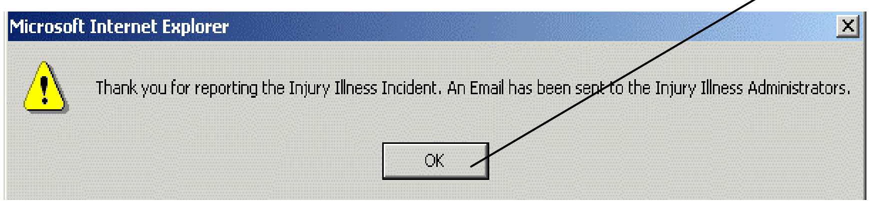
Quick Incident Report – Injury/Illness, cont'd.

4. A Pop-up box displays stating the incident was saved. Click **OK**.

5. A pop-up box displays stating an eMail notification has been sent. Click **OK**. You'll be returned to the Login screen.



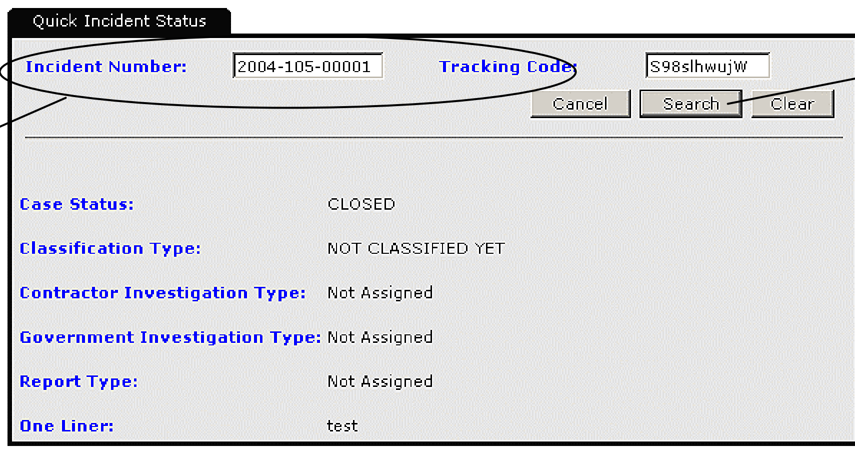
Notes

Quick Incident Report – Track

The Track option on the Quick Incident menu allows users to check the status of incidents already entered in the system. This "Quick Incident Status" report shows whether the case is open, what types of investigations are underway, the report type and a one-line description of the incident.

1. Click the **Track** button on the Quick Incident menu. The Quick Incident Status screen will display.

2. Enter the incident number and tracking code.



3. Click the **Search** button. The status fields below will populate.

Notes

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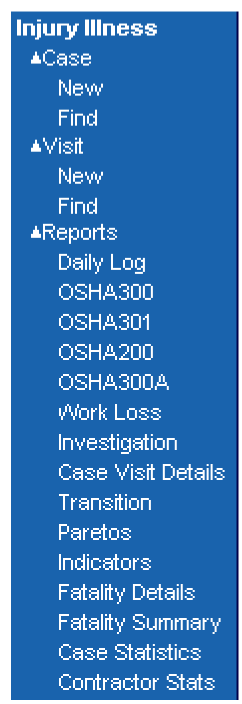
Exploring the Injury Illness Module

- **Finding a Case Record**
- **Creating a New Case**
- **Completing a Case or Visit Record**
- **Creating a New Visit**
- **Finding a Visit Record**
- **Running Injury/Illness Reports**
- **Injury/Illness Reports**

Throughout history, many of our greatest thinkers have explained that if you know your past, you can understand your present. Once you understand your present, you can predict your future. The Injury/Illness Module helps you to do just that. It allows you to record, track, and report on the occupational and non-occupational injuries and illnesses that affect your organization.

When you identify the injuries and illness that affect your organization, and analyze how and why they occurred, you have the knowledge to make a difference in the future of your organization. The Injury/Illness Module helps you acquire that knowledge.

The options shown to the right display in the Injury/Illness menu:



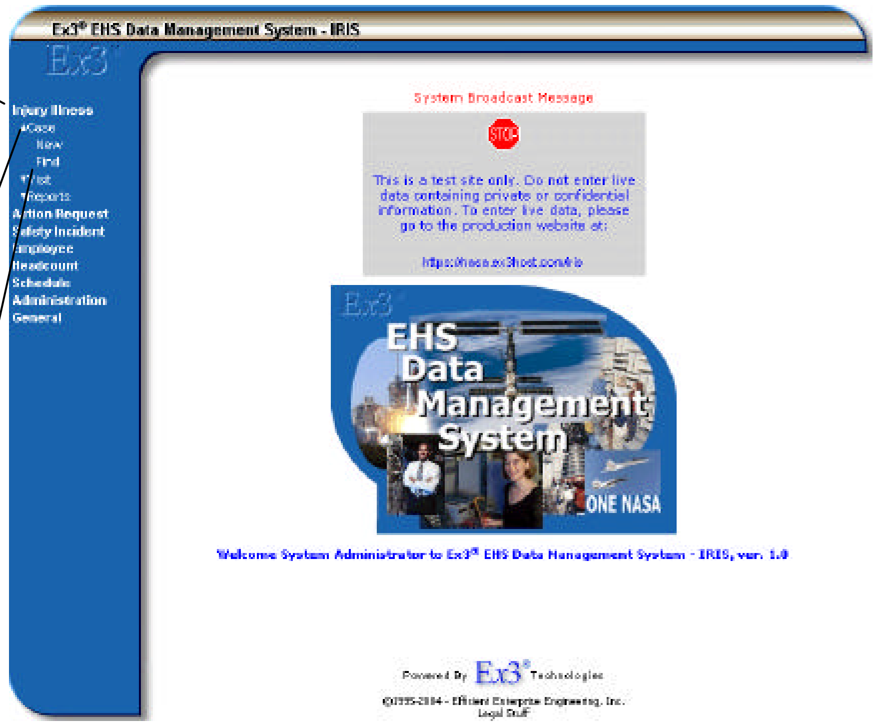
Finding a Case Record

From the time you first open a case to the time you close it, chances are you will need to refer to, update, or modify the information in the case record several times. In order to do that, you need to locate the case record in the system's database.

1. Click **Injury Illness** on the menu bar to open the drop-down menu.

2. Click **Case** under the Injury Illness menu.

3. Click **Find** under the Case menu. The System displays the Find Case tab.



Notes

Creating a New Case

The following definitions may help you while using the Injury/Illness Module:

- **Visit:** A record of every time an employee reports to a clinic for an injury or illness.
- **Case:** A collection of one or more visit records resulting from the same injury or illness.

Whenever an employee reports to the clinic, you record information about the visit. If the employee is reporting a new injury, you create a new case. If the employee is returning for further treatment of the same injury, you create a new visit.

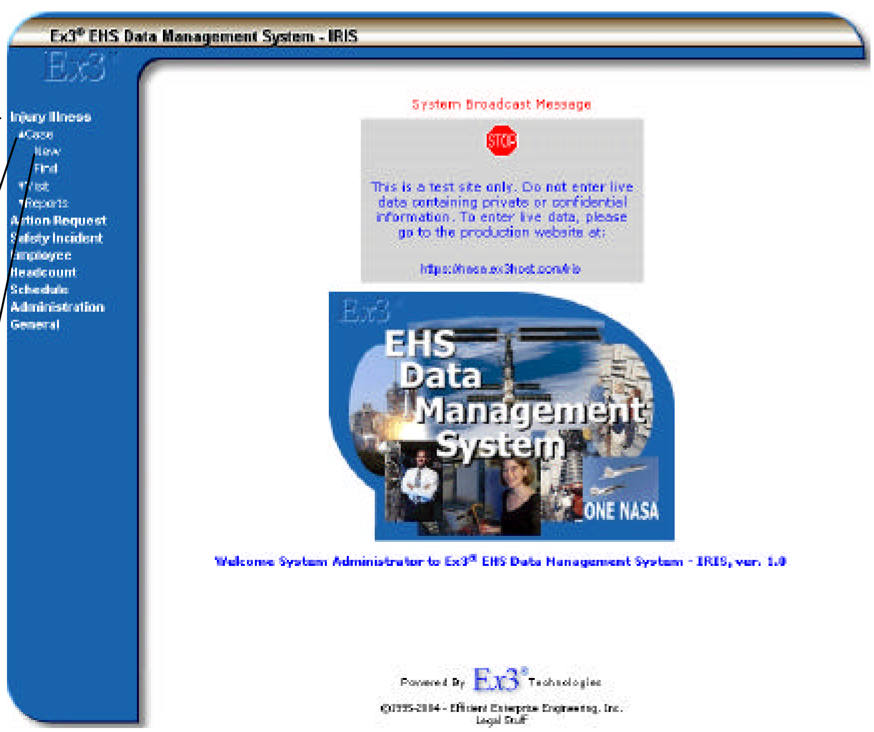
For example, if an employee breaks a finger and reports to a clinic, that is a new case. Then if later in the week, the employee returns to the clinic to get a new splint for the same broken finger, that is a visit.

The diagram below outlines how to create a new case.

1. Click **Injury Illness** on the menu bar to open the drop-down menu.

2. Click **Case** under the Injury Illness menu.

3. Click **New** under the Case menu. The System displays the Find Employee tab.

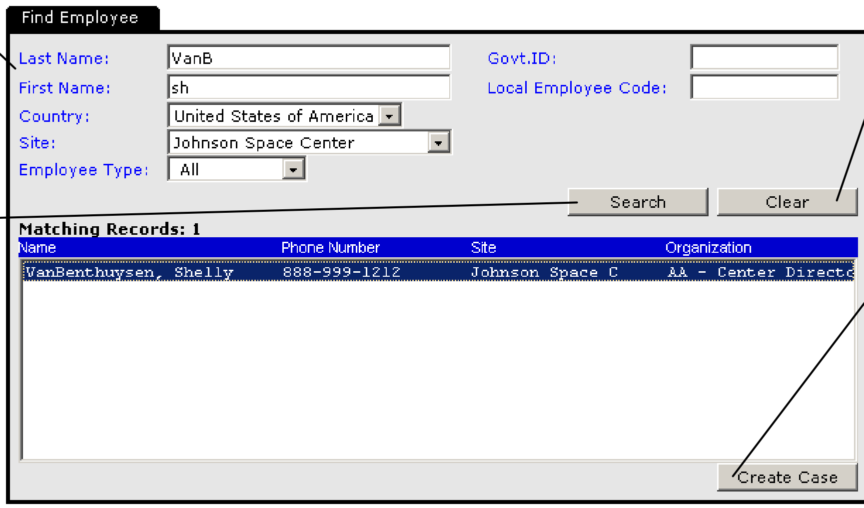


Notes

In order to record information about the employee's injury or illness, you need to locate the employee's record. The Find Employees tab assists you in this search. It provides several search criteria that you can use to locate the record. If the employee has a unique name, such as Wyzeski, the first three characters of the last name may be sufficient. But in the case of Chris Black, you may want to supply more information to reduce the number of possible matches returned.

1. Specify at least one criterion.

2. Click the **Search** button. A list of matches displays in the Employee Matching Records field.



If the appropriate employee is not listed, click the **Clear** button and repeat search with new criteria.

3. Select the appropriate employee from the list and click the **Create Case** button or double click the employee. A verification message displays.

Search Tips

Sometimes when you search a large database, it can be difficult to locate the record you want. Here are a few tips that will help you be able to search more effectively.

- Database queries are not "case sensitive." You don't have to worry about capitalizing a person's name correctly when typing it. Just type it all in lower case.
- Complete words or numbers aren't necessary. Entering the first three characters is enough in most cases.
- If you are getting too many matches, consider adding more information, such as the beginning of the first name along with a last name, in order to reduce the number of matches that fit your criteria. Keep in mind that the system will only return the first 100 matches for your search.
- If you are getting too few matches, enter a little less information in the search fields to increase the number of matches that fit your criteria.

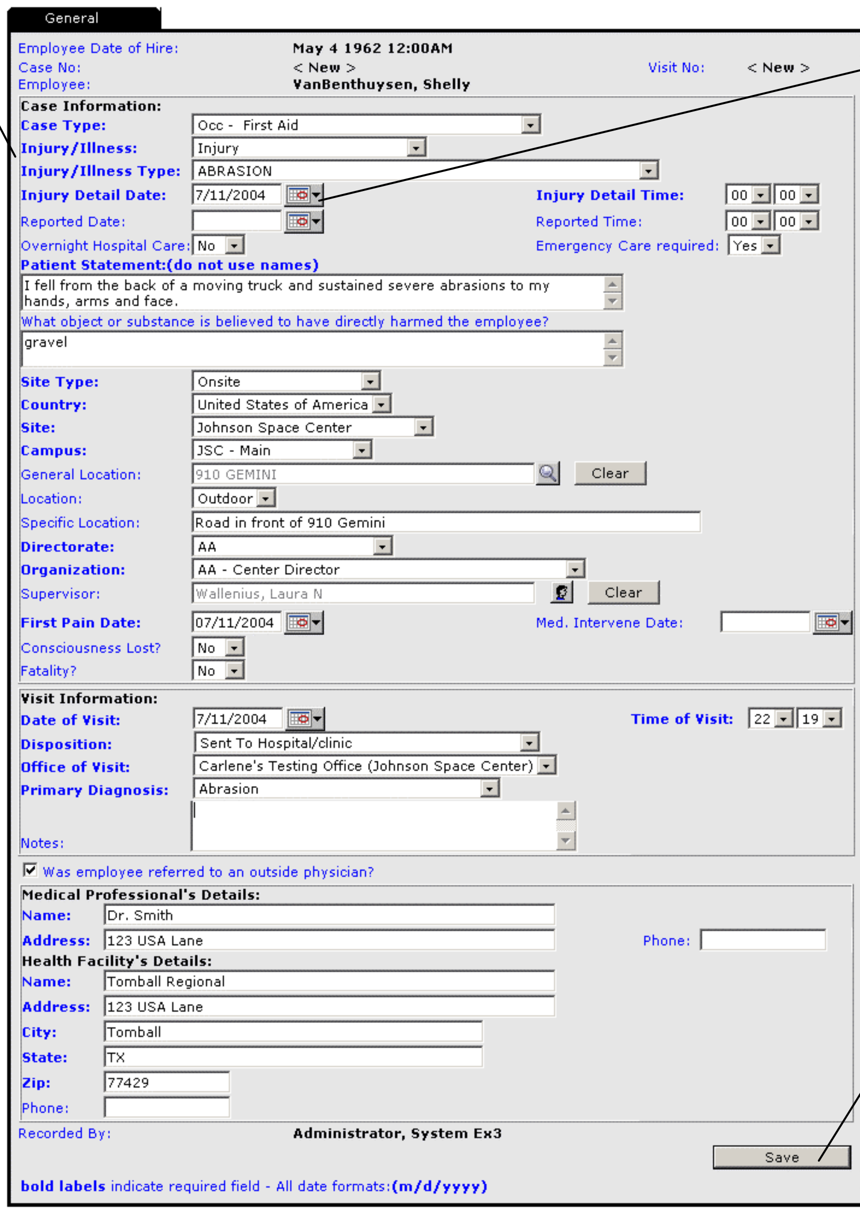
Employee Not Found

If an employee is not found in the database, you will receive an "Employee not found" message. You may need to create a new employee record.

For more information on creating new employee records see CREATING A NEW EMPLOYEE RECORD beginning on page 133.

After you confirm that you want to create a new case, the General tab displays. You use this tab to enter general information about the case (what happened, where did it happen) and about the visit (which clinic did the employee visit, what was the initial diagnosis, etc). The General tab, like the Quick Incident screens, contains text fields, drop-down lists, checkboxes, and buttons. To enter data, either use the **Tab** key to move from one field to the next or click in each field using the mouse. All required fields are marked with bold labels. You may not need to fill out every field. However, it is very important to capture as much information as you can in all the fields that do apply.

1. Fill in as many fields as possible, making sure to complete all required fields.



For more information on using look up buttons see NAVIGATING THE QUICK INCIDENT SCREENS beginning on page 17.

2. Click the **Save** button.

Creating a New Case, cont'd.

The system guides you during data entry by graying out fields that are not accessible or automatically populating fields with data once you have made specific selections. If the information has to be entered a specific way, then guidelines are either printed on screen or displays when you hover the cursor over the field.

There are several fields on the General tab that, when modified, change which additional fields display on the tab. For example, if the employee were referred to a doctor outside the clinic, you would select the **Employee referred to an outside physician?** checkbox. The system then displays the additional fields you need to record the doctor and/or hospital's contact information.

When you click the **Save** button the format and completeness of the information you have provided is checked. If you have left any required fields unfilled, the system displays a message prompting you to fill in the appropriate field.

After you have corrected the problem and successfully saved, the "Save Confirmation" pop-up displays.

Notes

Completing a Case or Visit Record

Once you have located or created a case or visit record, the system displays the Injury/Illness tabs. The number and names of the tabs that you have access to will differ depending on your role in the system. All the tabs are outlined in this section.

The tabs are laid out in a way that allows easy navigation. To move from one tab to another, you simply click on the tab. You may not need to fill out every available tab for every case. However, it is very important to capture as much information as you can on all the tabs that do apply. Remember, these records are only as good as the data they contain. So, a complete record produces better reports and more accurate statistics.

Once the tab is open, you can move from one field to another by pressing the **Tab** key on your keyboard or by clicking in each field with the mouse. All the required fields are marked with bold labels. If it is available, don't forget to click the **Save** button before switching to another tab or module.

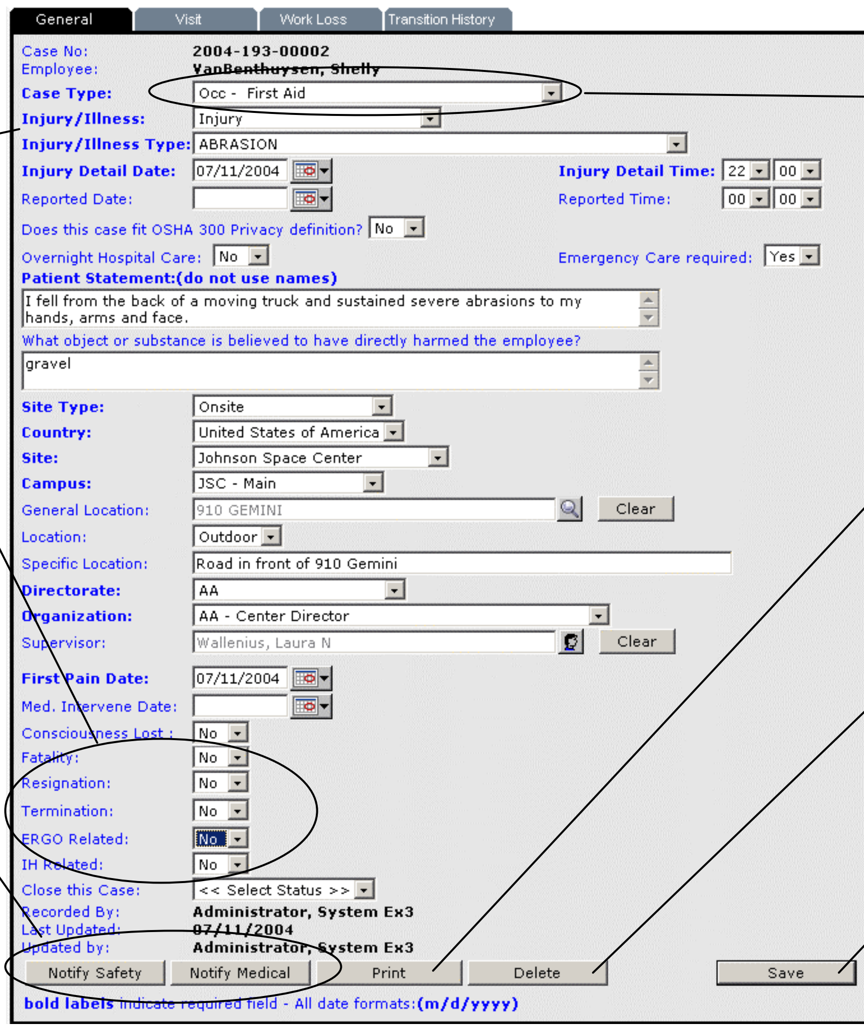
General Tab

The General tab records basic information about the injury or illness, such as the when and where it occurred, the injury/illness type, and a brief description of event. This General tab looks slightly different than the initial General tab you filled out when you opened a new case. The visit information that you recorded at the bottom of the tab is no longer visible. It is not lost, but has been moved to the Visit tab, where you may record additional visits at a later time.

1. Complete as many fields as possible, making sure to fill all the required fields whose labels are **bold**.

Selecting "Yes" in these fields activates additional data fields and/or buttons

Use these buttons to notify Safety and Medical personnel of the incident.



If the "Case Type" field is changed, a "Case Transition Information" screen displays after the record is saved. See page 33 for more information on the "Case Transition Information" screen.

Click the **Print** button to run a Case Details Report for this case.

Click the **Delete** button to delete this injury/illness case. This action cannot be undone.

2. Click the **Save** button. A confirmation message displays.

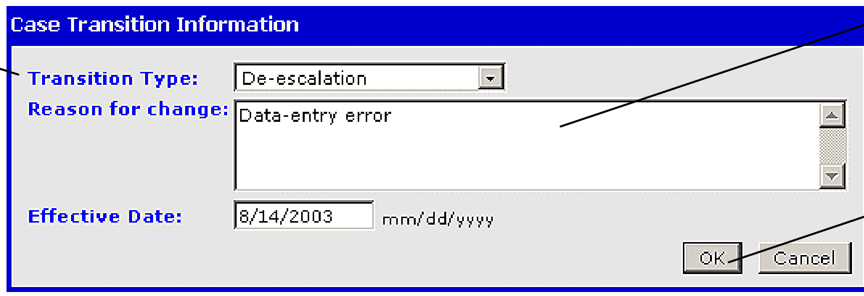
Notes

General Tab, cont'd.

Occasionally, a case type might need to be changed, if the original entry was incorrect, or the case was misdiagnosed. When you select a new case type on the General tab and click the **Save** button, the Case Transition Information window displays. The system captures important information regarding the change, such as the transition type and the reason for the change. The information collected in this window transfers to the Transition History tab once you click **OK**.

For more information on transition history see the TRANSITION HISTORY tab beginning on page 45.

1. Select the transition type.



2. Type an explanation for the change.

3. Click the **OK** button. A pop-up box verifies that the change has been successfully saved.

Notes

Visit Tab – Information

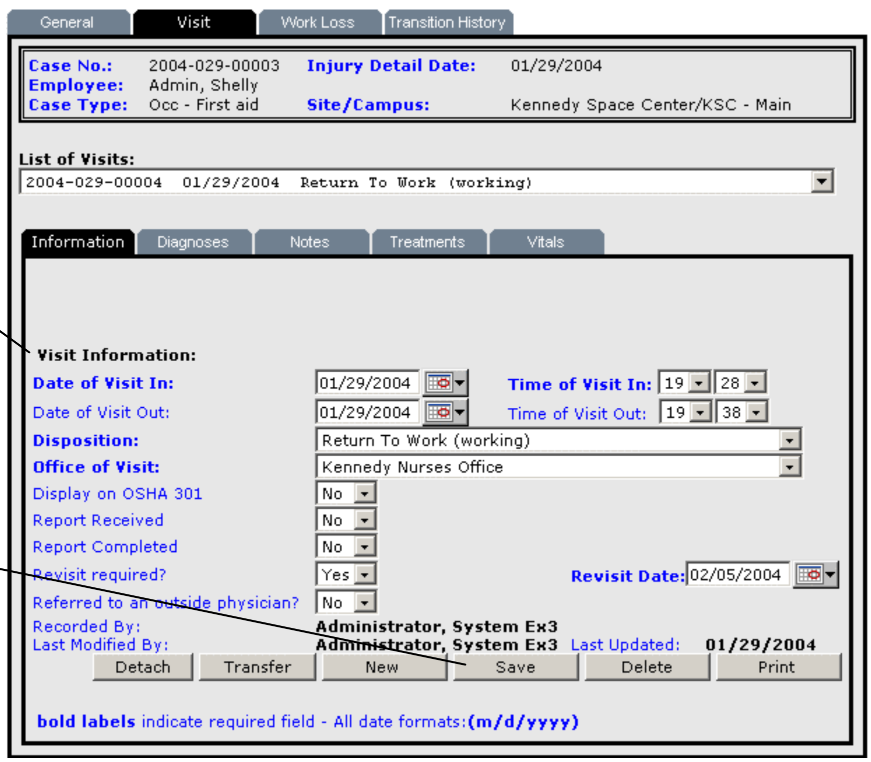
The Visit sub-tabs record information on each of the employee's visits to a clinic for a single injury or illness. For example, if the employee broke his arm and came to the clinic that would be one visit. When he came back to take the cast off, that would be a separate visit in the same case. Both visit records display in the **List of Visits** drop–down above the sub-tabs. The Information sub-tab contains data such as where and when the employee visited the clinic. You may create a new visit for a case from within the case as described below or by using the Visit menu option on the Injury Illness module's menu.

For information on creating a new visit record using the Visit menu option see CREATING A NEW VISIT beginning on page 61.

1. Click the **New** button or **<New Visit>** on the List of Visits drop-down.

2. Complete as many fields as possible, making sure to fill in all required fields.

3. Click the Save button. The new visit will appear in the List of Visits drop-down.



Notes

Visit Tab – Information cont'd.

The Information sub-tab contains a series of buttons at the bottom of the screen. Below is a description of each button.

Detach

Use the **Detach** button to remove a visit from one case and create a new case with it. A pop-up box appears after you click **Detach.** Click **OK** if you wish to create a new case. Click **Cancel** to return to the Information sub-tab.

Transfer

Use the **Transfer** button if you have created a visit in the incorrect case. A Find Case screen displays after you click **Transfer**. Run a search for the correct case. Select the correct case from the list. A pop-up verifies that you wish to transfer the visit to the selected case. Click **OK**. The selected visit is transferred.

New

Use the **New** button to prepare the data entry fields for new visit information.

Save

Use the **Save** button each time you enter new information on the screen.

Delete

Use the **Delete** button to remove any unnecessary or duplicate visit information from a case record. A pop-up displays to verify you wish to delete the selected visit. Click **OK** if you wish to delete the visit. Use this feature with caution since this action cannot be undone. *Note: Access to this button is restricted.*

Print

Use the **Print** button to run a Visit Details report for the selected visit.

Notes

Visit Tab – Diagnosis

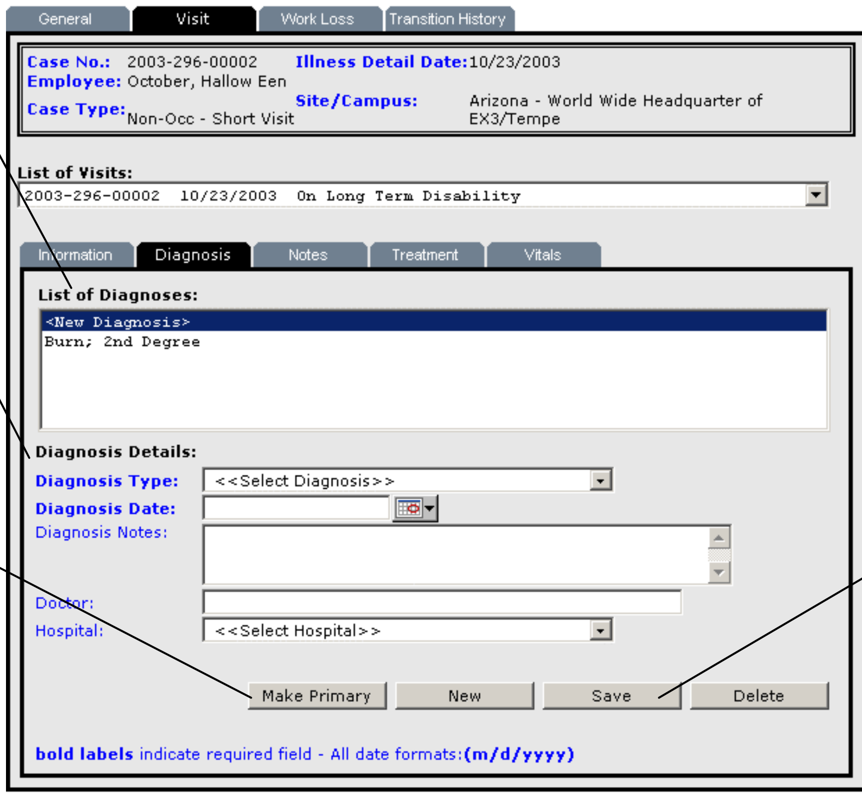
The Diagnosis sub-tab allows you to specify all the employee's diagnoses related to the incident. If a diagnosis is delayed or changed, for example an x-ray shows that the employee's bone is broken and not a sprain, you can make updates and edits to the diagnosis.

An employee can also have more than one diagnosis for an injury. If the employee was involved in a car accident, they may have a broken leg and a cut on their forehead. You can list all the diagnoses on this tab and mark one as the primary.

1. Click the **New** button or <New Diagnosis> on the List of Diagnoses drop-down.

2. Complete as many fields as possible, making sure to fill in all required fields.

To mark a primary diagnosis, simply select it from the **List of Diagnoses** field and click the **Make Primary** button.



3. Click the **Save** button.

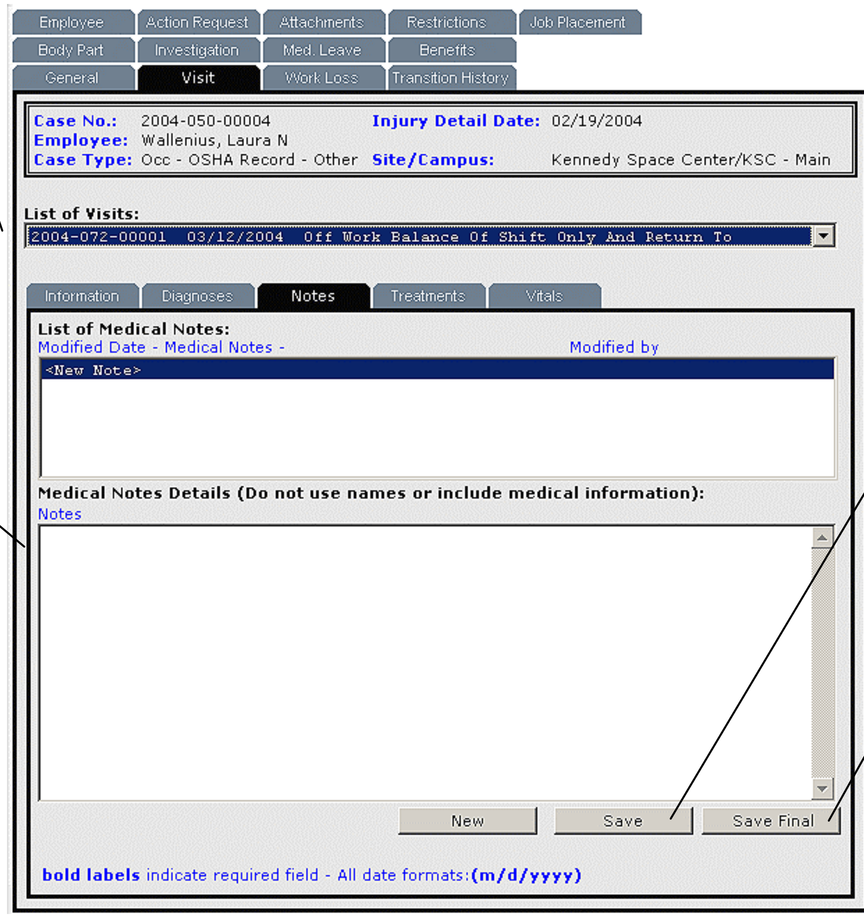
Notes

Visit Tab – Notes

If you've ever seen a patient's medical file, you'll know that there are usually copious notes, both handwritten and typed in each file. Using the Notes tab, you, the attending nurse, or physician can easily enter and review notes for each visit. You may also edit notes that you have created. The **Save Final** feature allows you to save notes so they can only be read, and not deleted or modified in any way.

1. Select a visit from the **List of Visits** field. Any previously recorded notes display in the **List of Medical Notes** field below.

2. Enter or modify the selected visit note in the Notes field.



3. Click the **Save** button. A confirmation message displays.

Click the **Save Final** button if the note should not be changed.

Notes

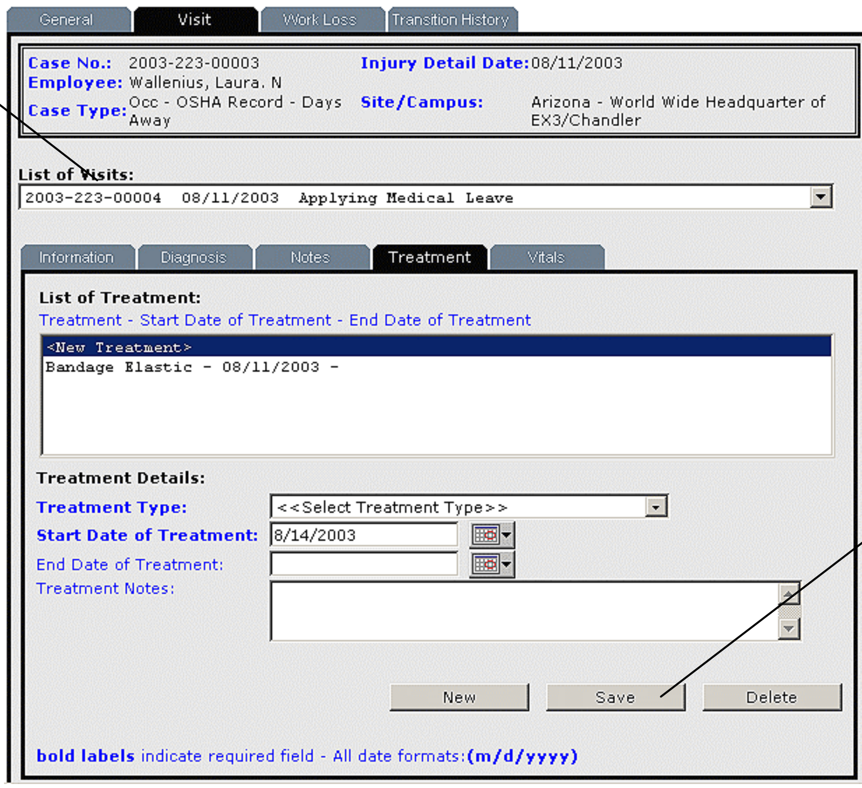
Visit Tab – Treatment

All the information about the different types of treatment you have given or prescribed for each visit of a case is recorded on the Treatment sub-tab. For example, the employee you are working with has a broken arm. First, you treat the broken arm by setting it in a cast, and then you prescribe pain medication. Later, you prescribe physical therapy.

Using this sub-tab you can see what treatments have been given, when, and how well they worked. All this information is vital when you are trying to determine the next course of treatment and action.

1. Select a visit from the **List of Visits** field. Any previously recorded treatments display in the **List of Treatments** field below.

2. Complete as many fields as possible, making sure to fill in all required fields.



3. Click the **Save** button. A confirmation message displays.

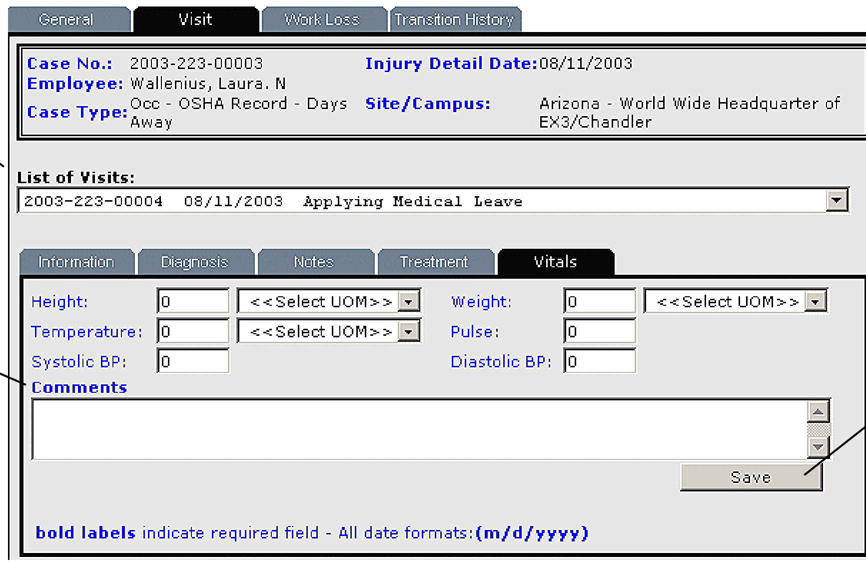
Notes

Visit Tab – Vitals

Every time an employee visits the clinic, normally the first thing you do is take their vital signs. Using the Vitals sub-tab you can quickly record or review an employee's vital signs for any visit.

1. Select a visit from the **List of Visits** field.

2. Complete as many fields as possible, making sure to fill in all required fields.



3. Click the **Save** button. A confirmation message displays.

Notes

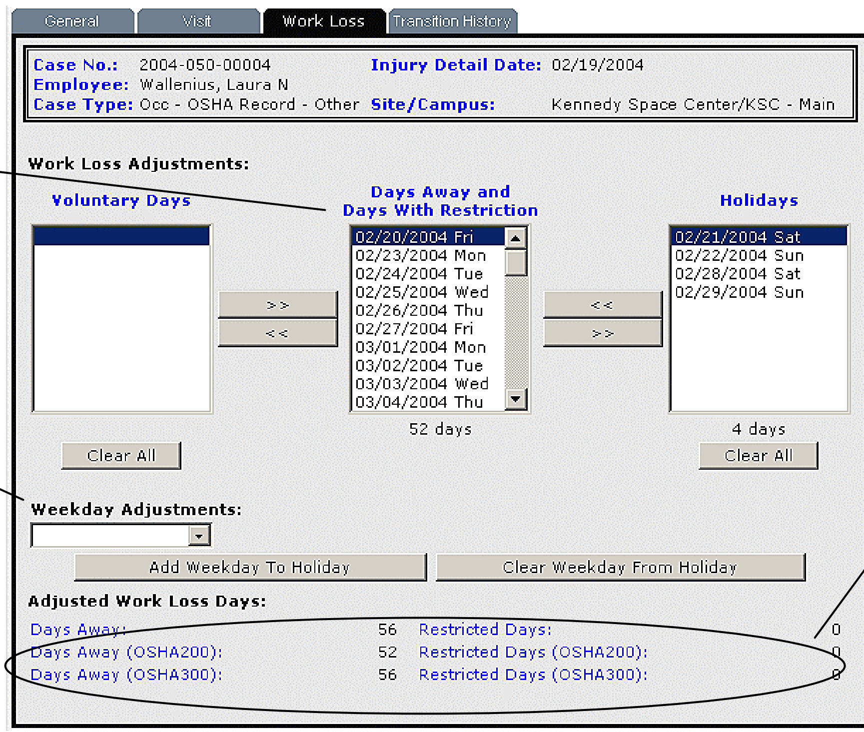
Work Loss Tab

The system can help you calculate the actual days of work that were lost or restricted due to an injury or illness. The calculations on this page fulfill the requirements for the OSHA 200 series of reports. With the new OSHA 300 guideline, all days are counted regardless of whether the employee would be working. However, even if reporting with the OSHA 300 standard, it is beneficial for the company to know exactly how many actual working days were lost for financial calculations.

The Work Loss tab displays the number of days an employee is away from work or working with a restriction due to an injury or illness. These days are captured on the Medical Leave and Restrictions tabs.

The days in this column filter from the Medical Leave and Restrictions tabs.

Identify regular holidays with the **Weekday Adjustments** field.



This chart displays the total days of lost work calculated by different methods.

Notes

Work Loss Tab, cont'd.

At the bottom of the Work Loss tab is a chart that shows the number of days away and restricted days. This chart also displays at the bottom of the Medical Leave, Restrictions and Job Placement tabs. It shows the total number of days of lost work for a given injury or illness.

Days Away Column:

Days Away:	0
Days Away (OSHA200):	0
Days Away (OSHA300):	0

The "Days Away" calculation represents the total number of days an employee was away from work due to this injury/illness. If the days are OSHA recordable the OSHA calculations will display.

Restricted Days Column:

Restricted Days:	0
Restricted Days (OSHA200):	0
Restricted Days (OSHA300):	0

The "Restricted Days" calculation represents the number of days an employee was working with a restriction due to this injury/illness. The restricted days calculation will not display until a job placement has been assigned. If the restricted days are OSHA recordable the OSHA calculations will display.

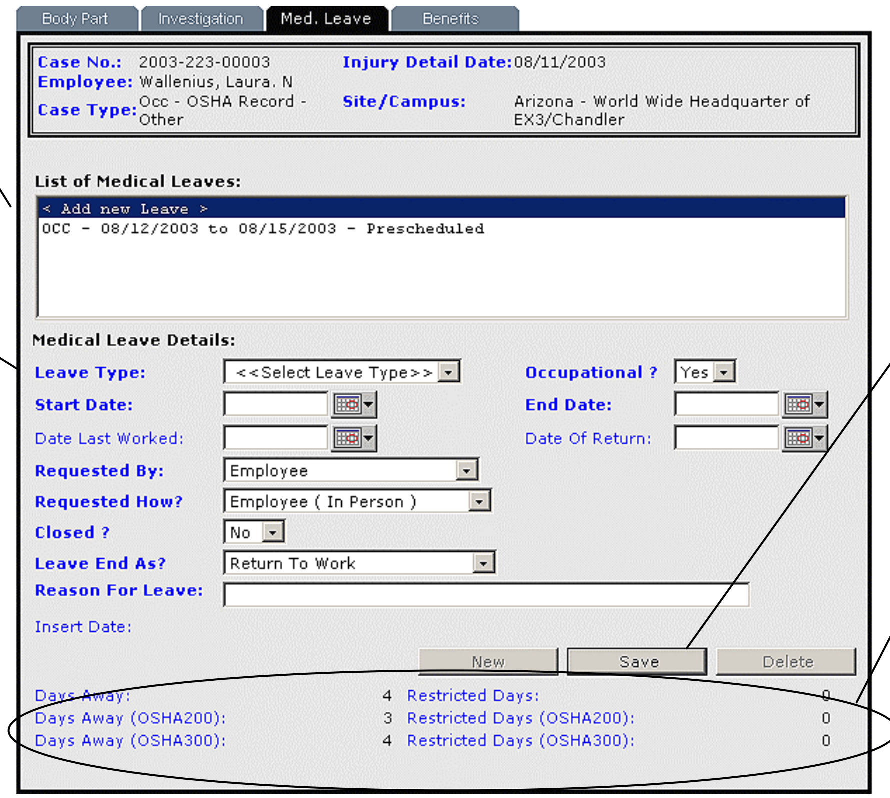
Notes

Medical Leave Tab

Occasionally an employee’s injury or illness requires that they take time off of work. The details for this medical leave from work are recorded on the Medical Leave tab. The system uses the information entered on this tab to calculate the employee’s days of lost or restricted work. The days assigned here will display on the Work Loss tab.

1. Highlight **<Add new Leave>** or click the **New** button.

2. Complete as many fields as possible, making sure to fill in all required fields.



3. Click the **Save** button.

For a detailed description of this chart refer to page 41.

Notes

Restrictions Tab

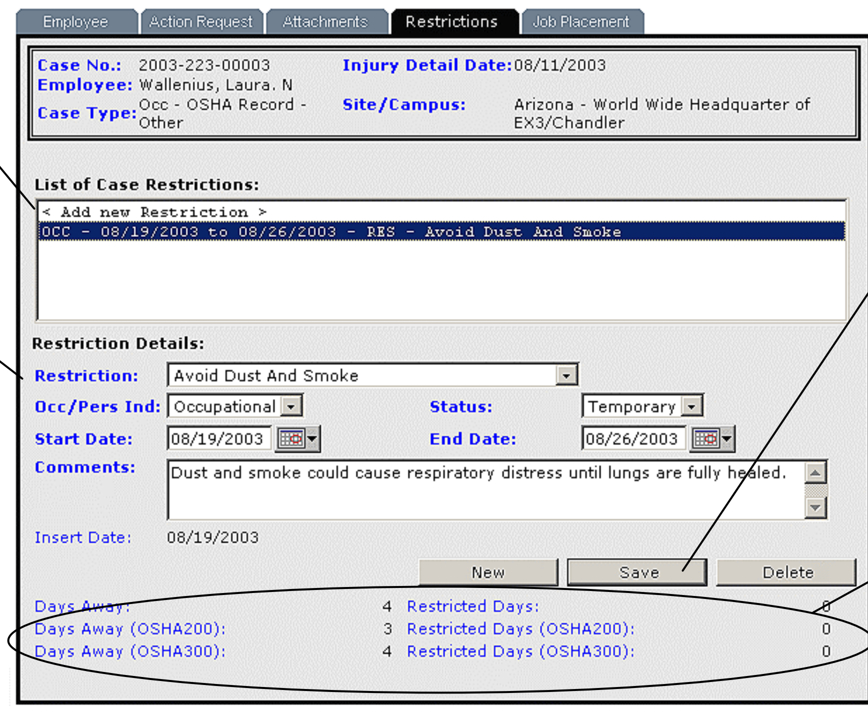
Sometimes, an employee has an injury or illness that restricts them from performing certain jobs or tasks. For instance, you can create a restriction for an employee who needs to avoid working around fumes and smoke because of a lung ailment. The Restrictions tab records the details of each restriction including its duration and status.

While restrictions are assigned here they do not affect the "Restricted Days" calculations on the bottom of the screen until an actual job placement has been made. Once a job placement has been assigned on the Job Placement tab, the "Restricted Days" calculations fill with the number of days an employee is working with a restriction.

For more information on creating a job placement see the JOB PLACEMENT TAB beginning on page 44.

1. Highlight **<Add new Restriction>** or click the **New** button.

2. Complete as many fields as possible, making sure to fill in all required fields.



3. Click the **Save** button. A pop-up box verifies that the restriction has been successfully saved.

For a detailed description of this chart refer to page 41.

Notes

Job Placement Tab

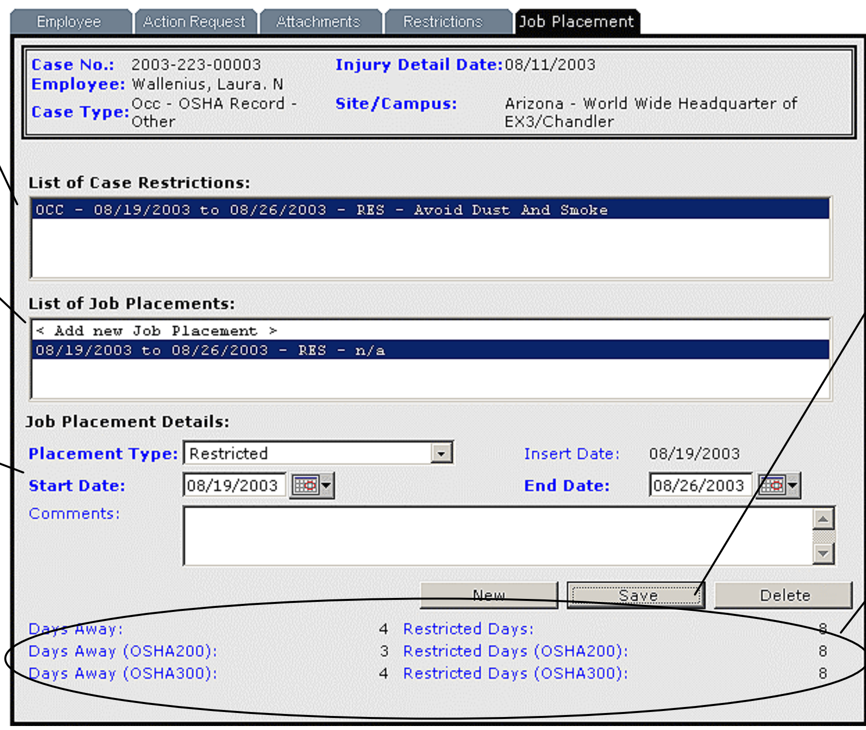
If an employee's injury or illness prevents them from performing their normal job, they can be temporarily reassigned to another position. Use the Job Placement tab to note and track any temporary placement that you make for an employee to accommodate a work restriction. Once a job placement has been assigned for a restriction the restricted days calculations on the bottom of the screen fills with the appropriate number of days.

For more information on assigning a restriction see the RESTRICTIONS TAB beginning on page 43.

1. Highlight the case restriction that requires a job placement.

2. Highlight **<Add new Leave>** or click the **New** button.

3. Complete as many fields as possible, making sure to fill in all required fields.



4. Click the **Save** button. A pop-up box verifies that the placement has been successfully saved.

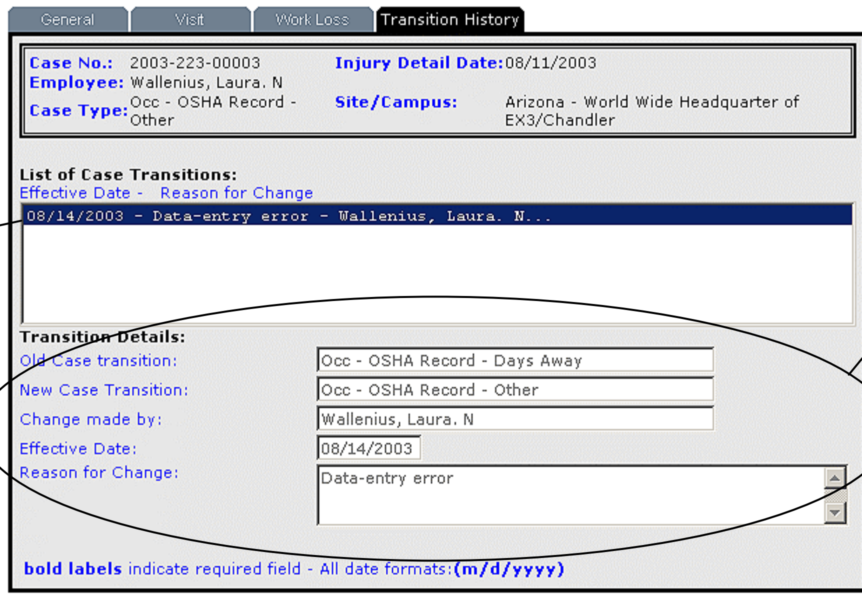
For a detailed description of this chart refer to page 41.

Notes

Transition History

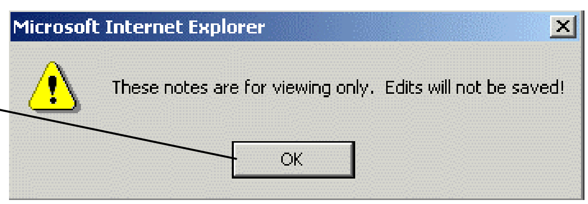
The Transition History tab displays all changes made to the “Case Type” field on the General tab. All the fields on this tab are read only. If the case type has been changed multiple times, select the transition you would like to view in the **List of Case Transitions** field. The details display in the Transition Details area.

1. Select the transition that you would like to view.



2. View the Transition Details here.

This screen displays when you first select the Transition History tab.

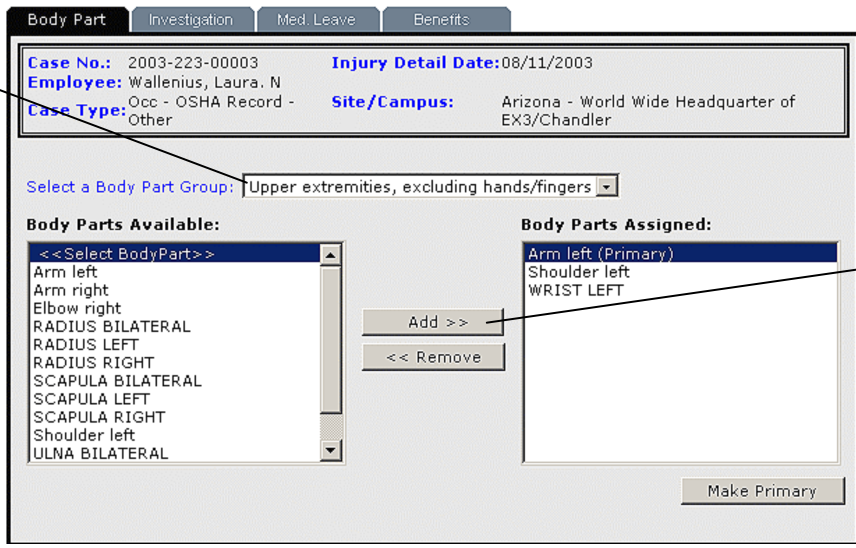


Notes

Body Part Tab

Using the Body Part tab, you can specify which of the employee's body parts have been affected by the injury or illness. The body parts are separated into small groups, so you can quickly and easily navigate this tab. If more than one body area has been affected, you can list them all and pick the one that is primarily affected.

1. Select the main body part group from the drop-down list. A list of associated body parts display in the **Body Parts Available** list.



2. Select the affected body part from the **Body Parts Available** list and click the **Add** button. The body part moves to the **Body Parts Assigned** list.

Notes

Investigation Tab – General

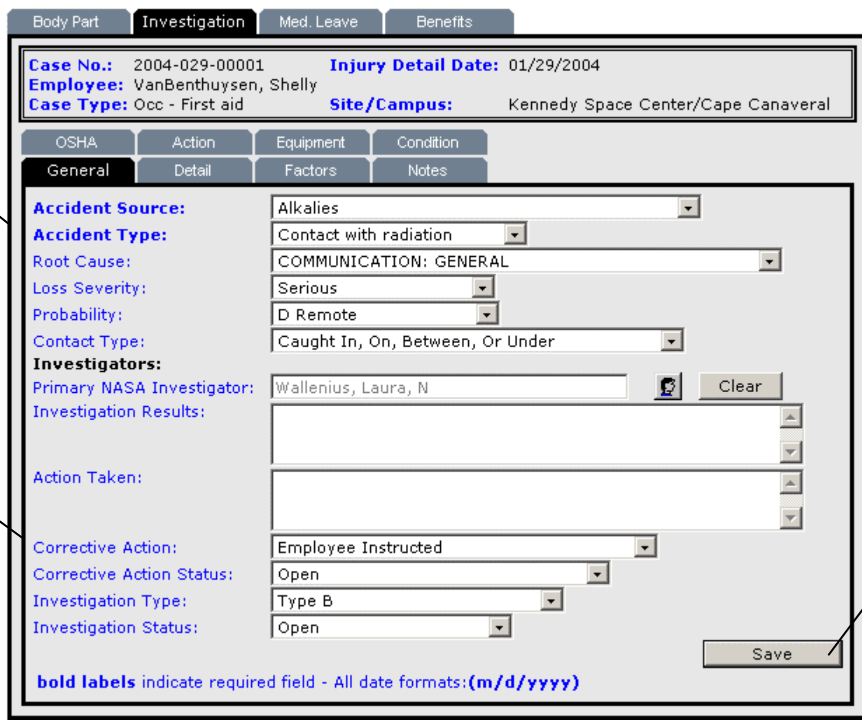
When an incident occurs, the first concern is always treating the injured or ill employee. However, once that concern is addressed, it is also important to investigate why it happened to prevent recurrence. The Investigation sub-tabs collect the information needed to work toward prevention.

The General sub-tab records all general investigation information, including the cause of the injury or illness, the investigation result, and the actions taken. If a supervisor has filled out a Supervisor Incident Report (SIR) form for this case, some of the fields on this page automatically fill with that information.

For more information on the Supervisor Incident Report see SUPERVISOR INCIDENT REPORT (SIR) beginning on page 65.

1. Complete as many fields as possible, making sure to fill in all required fields.

Investigators can recommend corrective actions and report on their progress.



2. Click the **Save** button. A confirmation message displays.

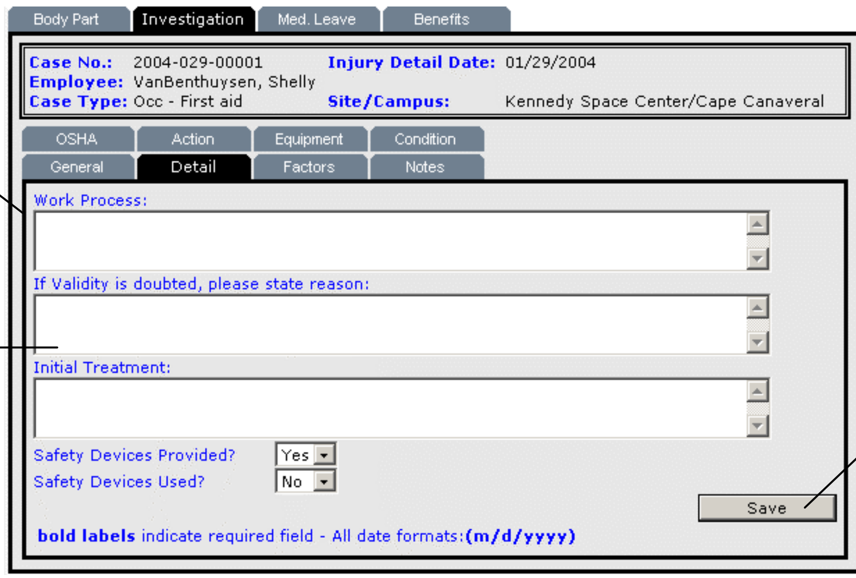
Notes

Investigation Tab – Detail

The Detail sub-tab records what was happening at the time of the incident and what treatment was given right after the incident. Knowing this helps to paint a general picture of the incident and its timeframe.

1. Fill in as many fields as possible to make the record complete.

If the investigator has any reason to doubt the validity of a statement, they can note it here.



2. Click the **Save** button. A confirmation message displays.

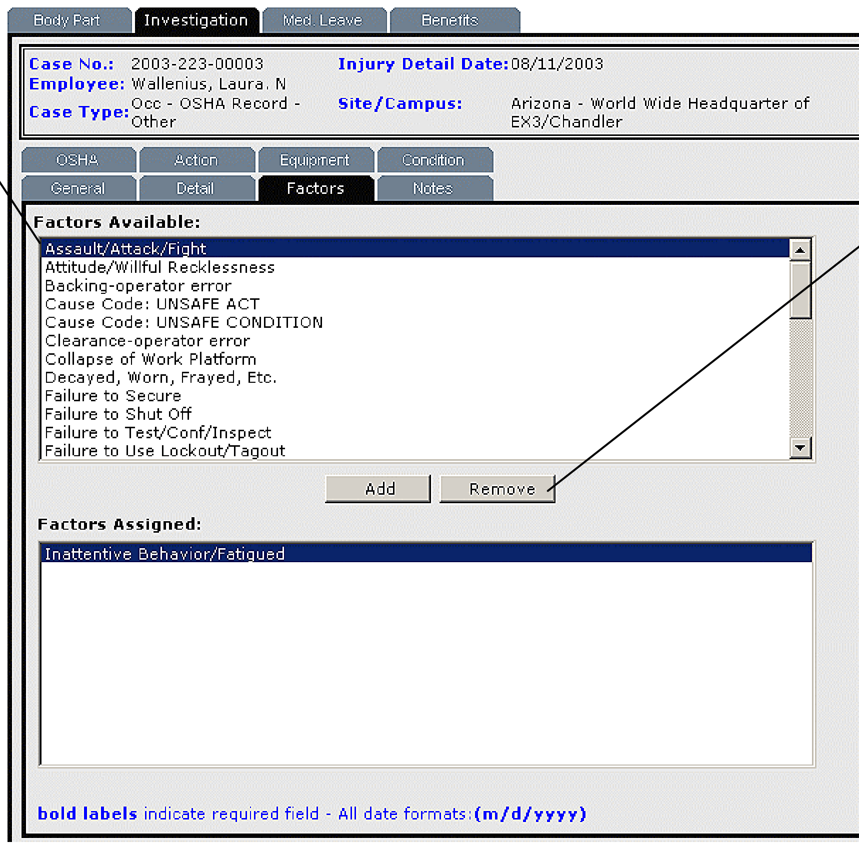
Notes

Investigation Tab – Factors

Many things can contribute to an incident, from simple human error to a structural flaw. The Factors sub-tab allows you to record any factors that have been found, during the investigation, to have contributed to this specific incident. Since more than one factor may be involved in an incident, you may assign multiple factors using the "Factors Available" list. If a supervisor has filled out a SIR form for this case, factors may display in the "Factor Assigned" list based on the information in the SIR form.

For more information on the Supervisor Incident Report see SUPERVISOR INCIDENT REPORT (SIR) beginning on page 65.

Select a contributing factor from the **Factors Available** list and click the **Add** button. The factor moves to the **Factors Assigned** list.



To remove a factor, select the factor from the **Factors Assigned** list and click the **Remove** button. The factor will return to the **Factors Available** list.

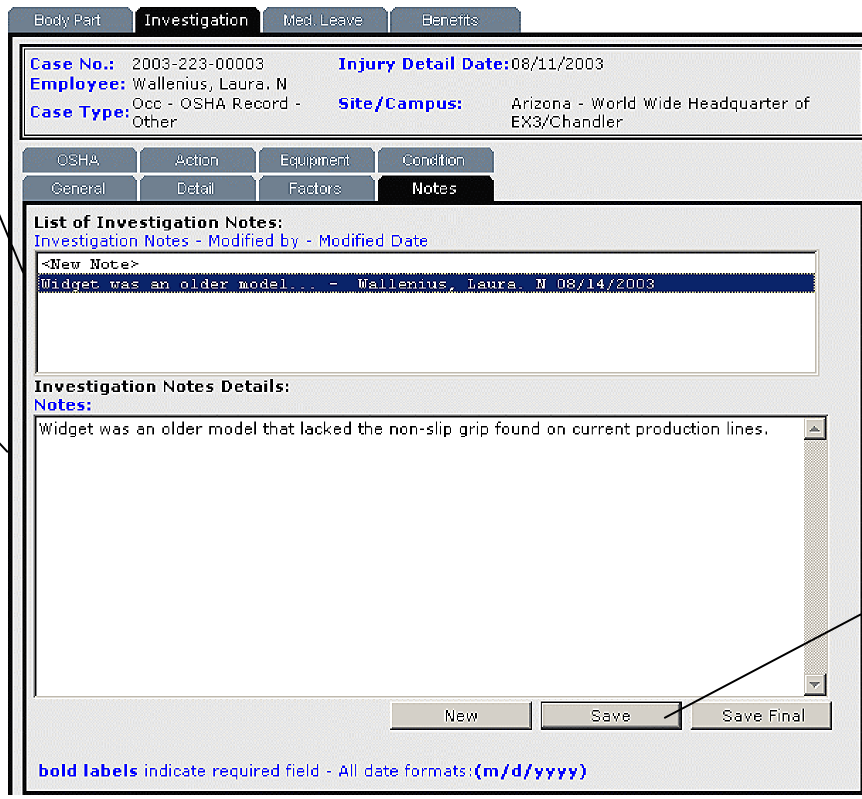
Notes

Investigation Tab – Notes

The Notes sub-tab records any investigation notes related to this specific case. You can use the **Save Final** feature to lock the notes so they can only be read, and not modified or deleted.

1. Highlight **<New Note>** or click the **New** button.

2. Type the text of the note in this space.



3. Click the **Save** button. A confirmation message displays.

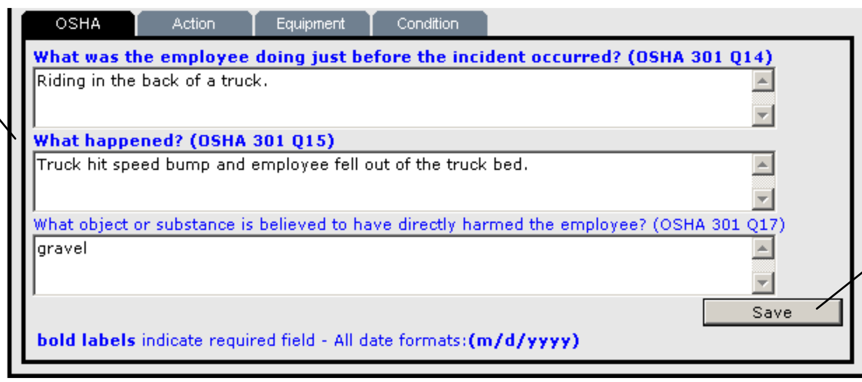
Notes

Investigation Tab – OSHA

It may be necessary to report some incidents to the Occupational Safety and Health Administration (OSHA). Investigation information needed for OSHA reporting is collected on the OSHA sub-tab. If a supervisor has filled out a SIR form for this case, some of the fields on this page automatically fill with that information.

For more information on the Supervisor Incident Report see SUPERVISOR INCIDENT REPORT (SIR) beginning on page 65.

1. Complete as many fields as possible, making sure to fill in all required fields.



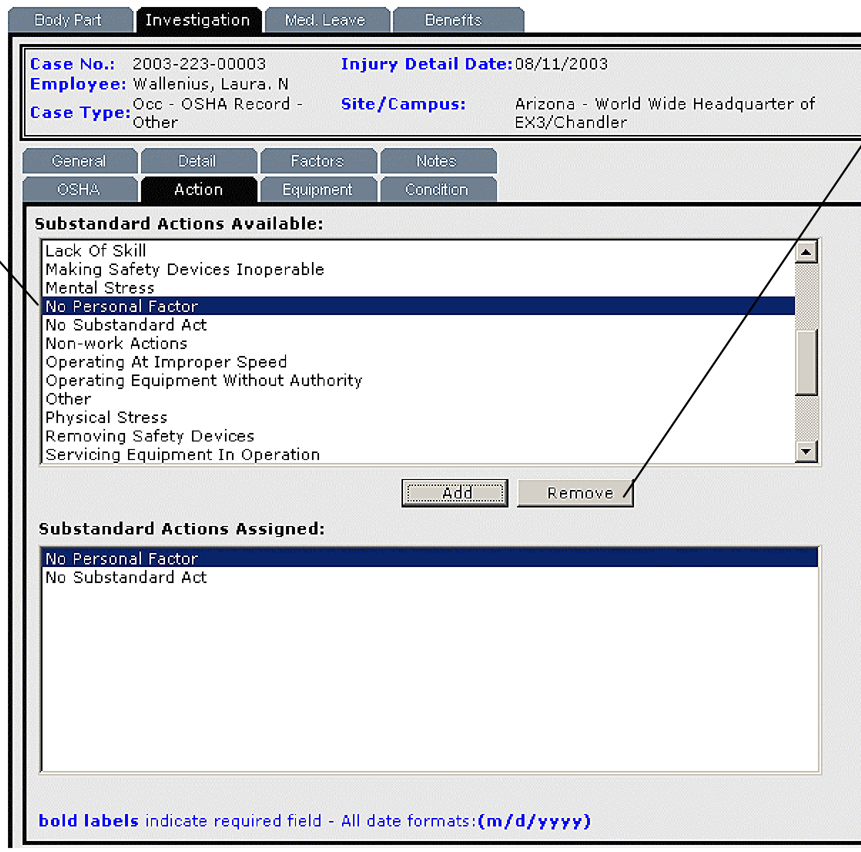
2. Click the **Save** button. A confirmation message displays.

Notes

Investigation Tab – Action

If the investigation finds that the incident was the result of a human action, those actions can be noted on the Action sub-tab. Since more than one action may be involved in an incident, you may assign multiple actions using the “Substandard Actions Available” list.

Select a contributing action from the **Substandard Actions Available** list and click the **Add** button. The action moves to the **Substandard Actions Assigned** list.



To remove a factor, select the factor from the **Substandard Actions Assigned** list and click the **Remove** button. The factor returns to the **Substandard Actions Available** list.

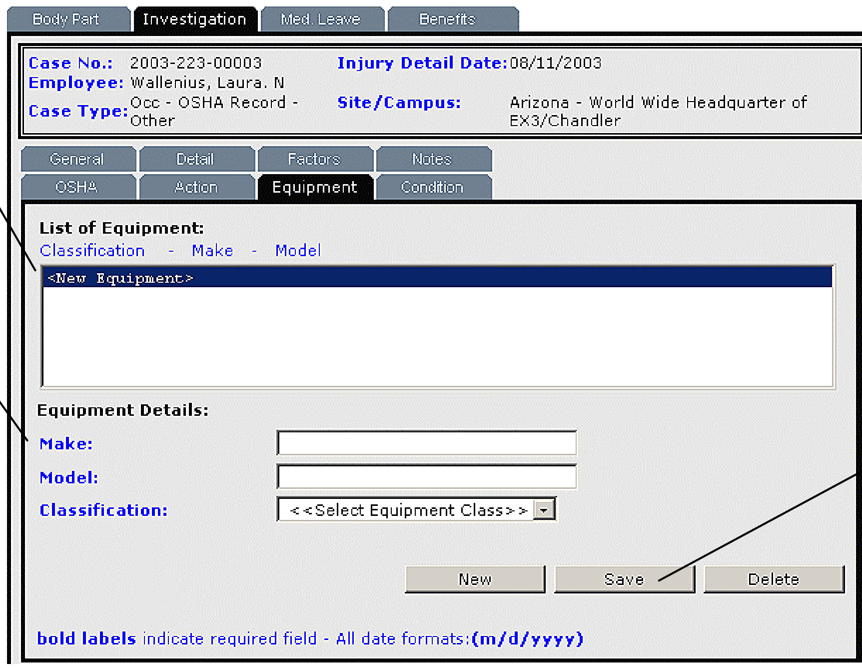
Notes

Investigation Tab – Equipment

If the investigation shows that some specific equipment was involved in or caused the incident, that equipment is identified and recorded on the Equipment sub-tab. This tab is intended to record all equipment involved in an incident regardless of damage. The term equipment refers to any equipment involved in an incident; this can include automobiles but is not limited to them.

1. Highlight **<New Equipment>** or click the **New** button.

2. Complete as many fields as possible, making sure to fill in all required fields.



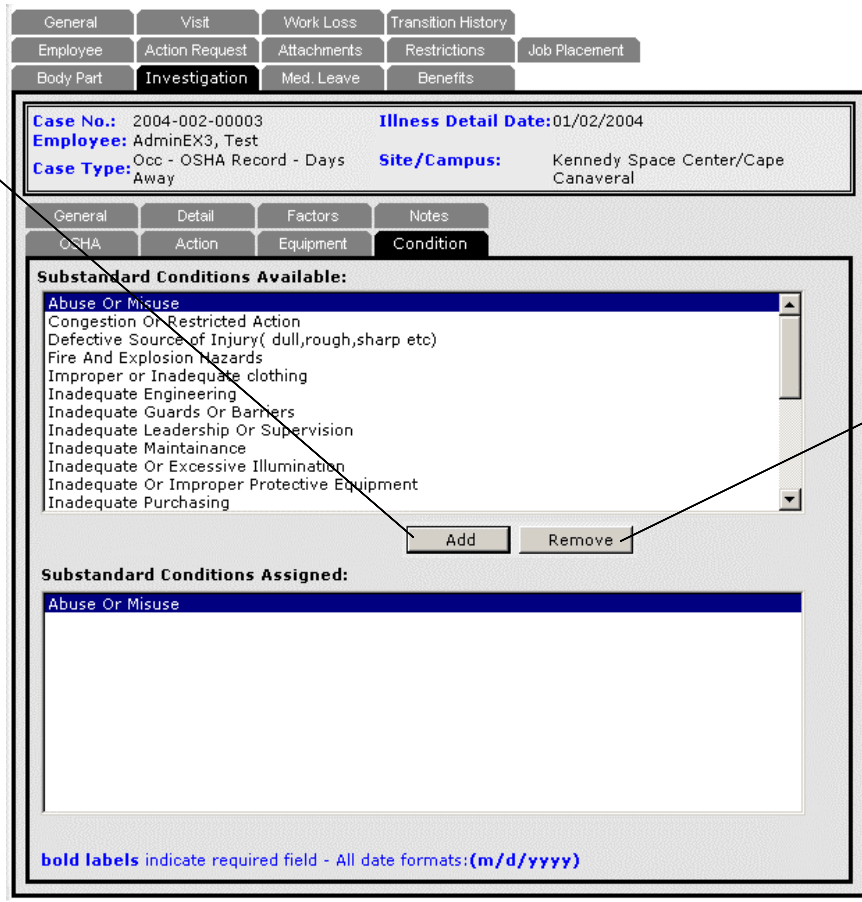
3. Click the **Save** button. A confirmation message displays.

Notes

Investigation Tab – Condition

If the incident was the result of the working condition or environment, those conditions are noted using the Conditions sub-tab. Since more than one condition may be involved in an incident, you may assign multiple conditions using the “Substandard Condition Available” list.

Select a contributing condition from the **Substandard Conditions Available** list and click the **Add** button. The condition moves to the **Substandard Conditions Assigned** list.



To remove a condition, select the condition from the **Substandard Conditions Assigned** list and click the **Remove** button. The factor will return to the **Substandard Conditions Available** list.

Notes

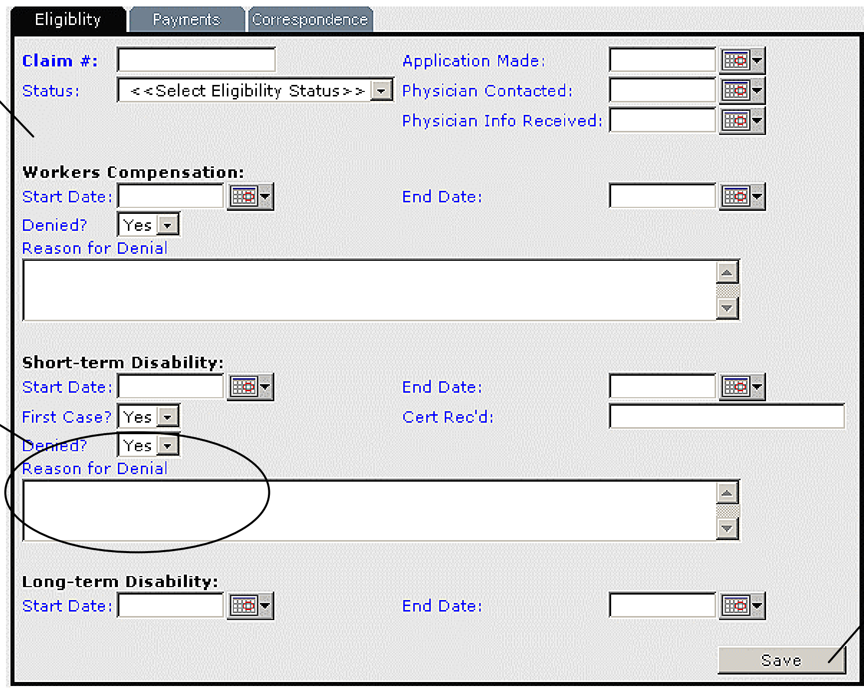
Benefits Tab – Eligibility

Sometimes, an employee's injury or illness is serious enough to require a claim for disability benefits or other compensation. The Benefits tab stores all the information on worker's compensation and disability using three sub-tabs.

The Eligibility sub-tab records general claim information as well as specific details depending on the type of claim: worker's compensation, short-term disability, and long-term disability.

1. Complete as many fields as possible, making sure to fill in all required fields.

The "Reason for Denial" field only displays when the "Denied?" field shows Yes.



2. Click the **Save** button. A confirmation message displays.

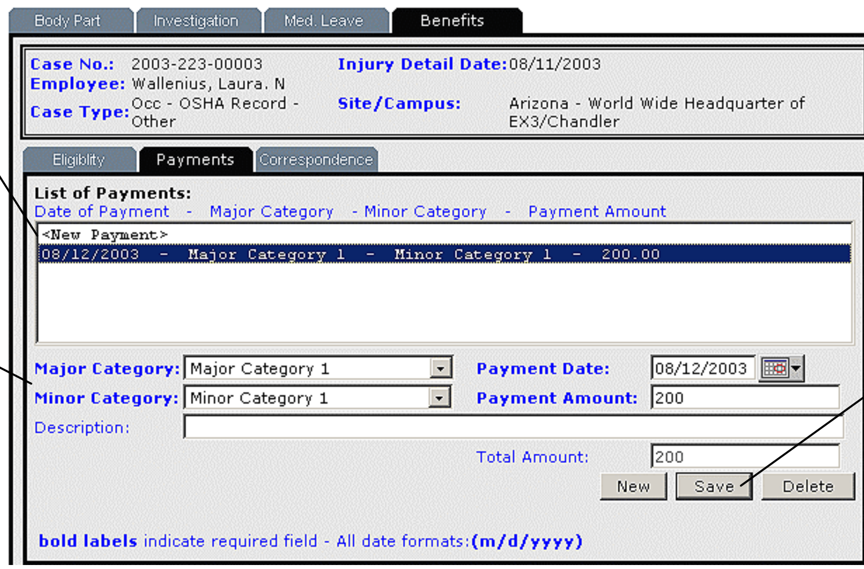
Notes

Benefits Tab – Payments

The Payments sub-tab of the Benefits tab records all monetary compensation to employees disabled by injuries or illnesses at work. Each payment is listed separately at the top of the screen; you can view details by highlighting a payment on the list.

1. Highlight **<New Payment>** or click the **New** button to begin entering data.

2. Complete as many fields as possible, making sure to fill in all required fields.



3. Click the **Save** button when all the payment data has been entered.

Notes

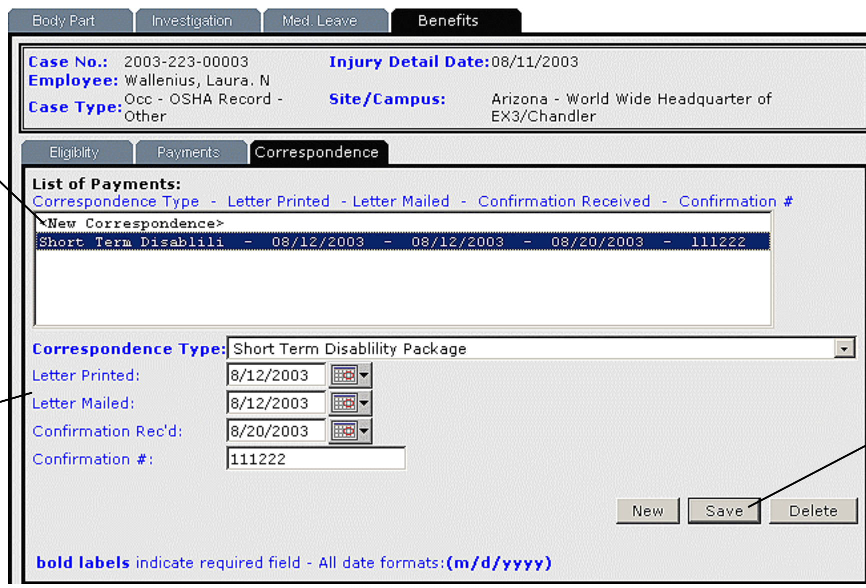
Benefits Tab – Correspondence

With injury or illness cases, it can be difficult to manually keep track of what forms and documents have been sent to the employee and when. Using the Correspondence sub-tab of the Benefits tab, you can record which documents have been sent to the employee, important dates, and confirmation numbers.

1. Highlight **<New Payment>** or click the **New** button to begin entering data.

2. Complete as many fields as possible, making sure to fill in all required fields.

3. Click the **Save** button.



Notes

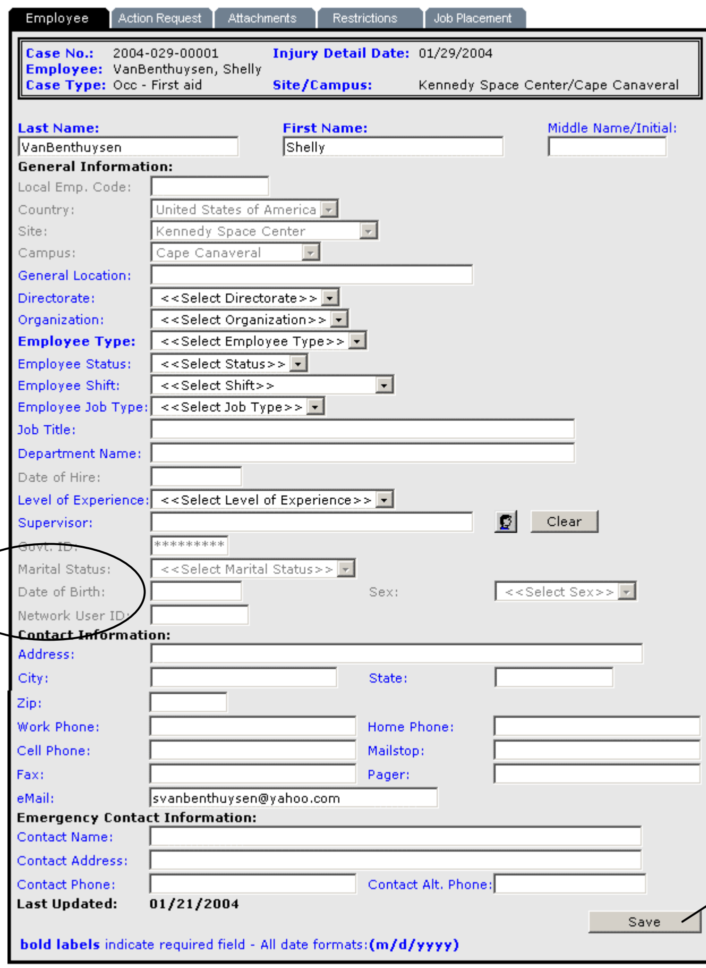
Employee Tab

When you need to quickly find an employee's personnel information such as their phone number or the building they work in, click the Employee Tab. If any of the information is incorrect, you can make updates on this tab. These changes, however, will only be saved in this case record and will not affect the employee's master record. To affect a permanent change to an employee's master record you must use the "Edit" option within the Employee Module.

For more information on editing an employee's master record see FINDING AN EMPLOYEE RECORD beginning on page 126.

1. Make any modifications necessary to the **Blue** data entry fields.

The **Grey** fields represent non-editable fields. They cannot be changed using the Employee Tab.



2. Click the **Save** button.

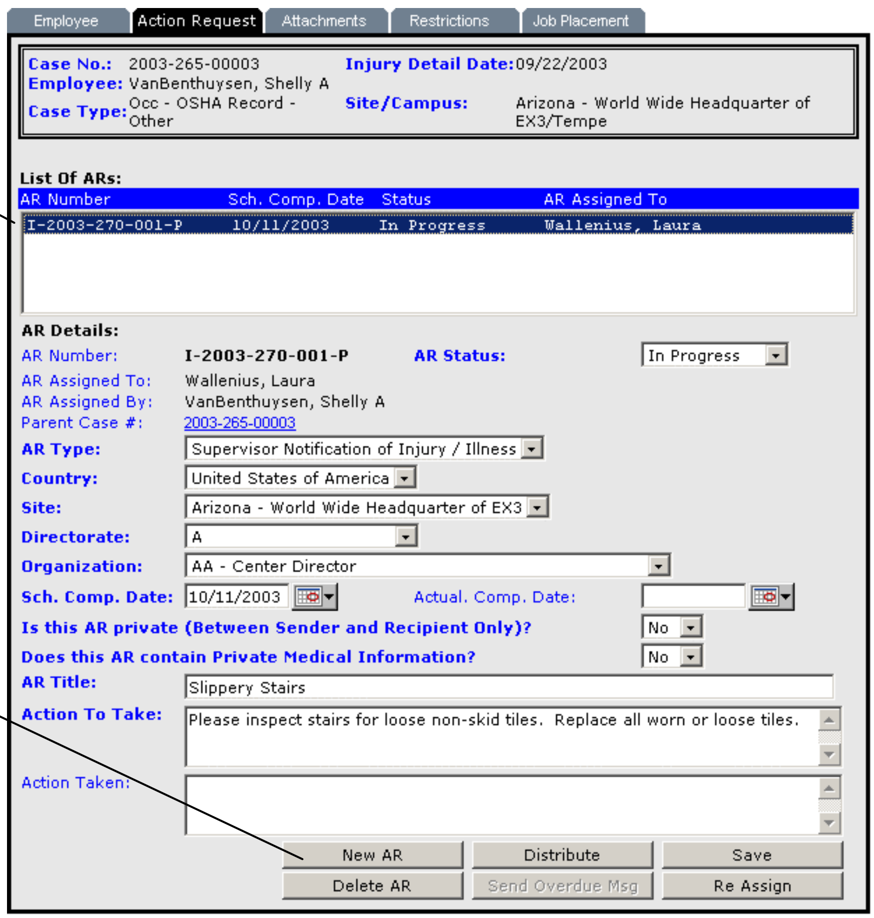
Notes

Action Request Tab

When managing a case, you may need to delegate some case-related tasks to other employees or to request specific information so you can complete your tasks. You can use the Action Request tab to make those requests.

For more information about creating action requests see CREATING AN INCIDENT SPECIFIC ACTION REQUEST beginning on page 87.

Keep track of the progress of all action requests for this case.



New AR allows you to create and assign a new Action Request.

Notes

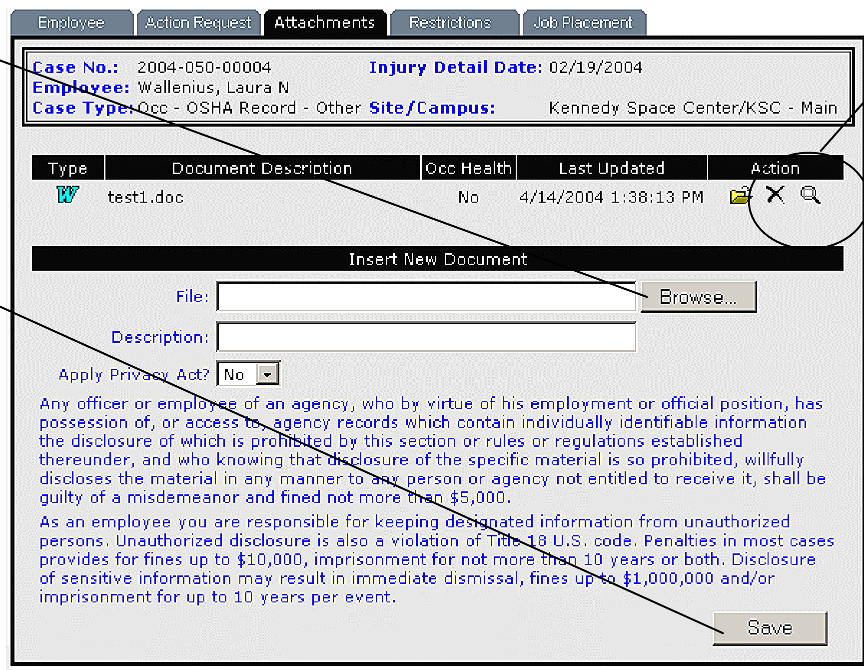
Attachments Tab

Using the Attachments Tab you can end the days of bulging files, overflowing with backup documentation like emailed doctor's exam notes and test results. Rather than printing it out and sticking the paper copy in the case file, you can attach electronic or scanned documents directly to the record. For example, if you have an invoice, photo, an audio file of a doctor's comments, or even video documentation, you can attach copies of them to this file for future reference.

If the document you want to attach contains sensitive information select "Yes" in the "Apply Privacy Act?" field before you save the document. This will limit access to this document to medical personnel.

1. Click the **Browse** button. Select a file using the "Choose File" window that displays.

2. Click the **Save** button. The file displays in the document list above.



Use the action icons to manipulate the attached document.

Notes

Creating a New Visit

If an employee reports to a clinic for a follow-up visit for an existing injury or illness, you create a new visit record in the system. Before you may create a new visit you must first locate the parent case record. To do this, you start at the Injury Illness main menu.

1. Click **Injury/Illness** on the menu bar to open the drop-down menu.

2. Click **Visit** under the Injury/Illness menu.

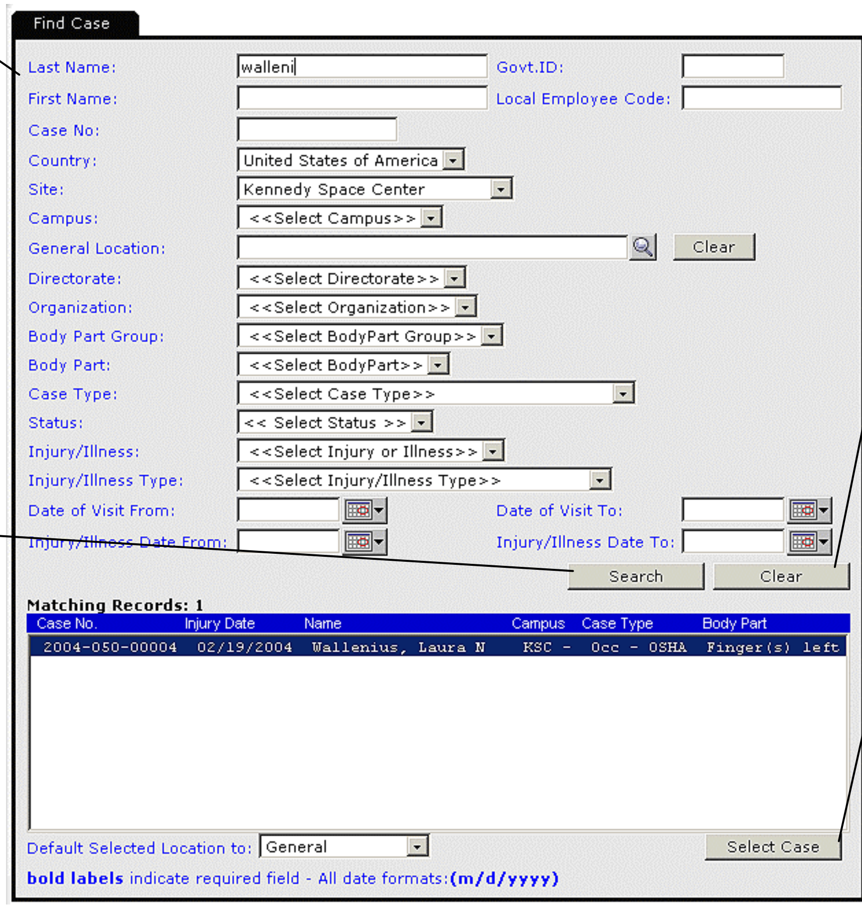
3. Click **New** under the Visit menu. The Find Case tab displays.

Notes

Creating a New Visit, cont'd.

You now need to search through the system's database of existing cases. Since each case involves a person, you may search for the person's first and/or last names. However, the search criteria screen supplies many more tools to help you locate the appropriate record.

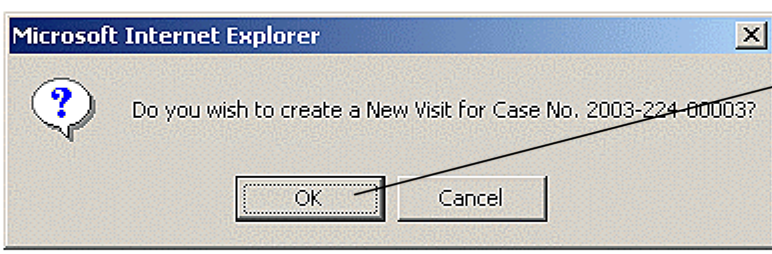
4. Specify at least one criterion.



If the appropriate case is not listed, click the **Clear** button and repeat search with new criteria.

5. Click the **Search** button. A list of matches displays in the Matching Records field.

6. Select the appropriate case from the list and click the **Create Visit** button or double click the employee.



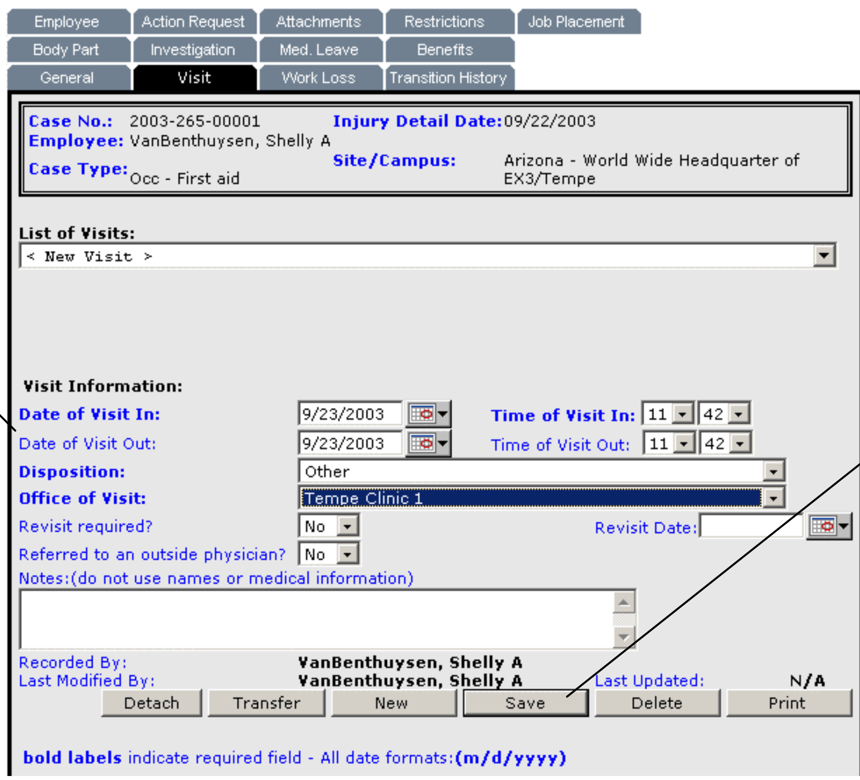
7. A verification message displays. Click **OK**. A new visit screen will display.

Creating a New Visit, cont'd.

It is best if you fill out as many of the Visit sub-tabs as possible; however, you are only required to fill out the Information sub-tab to open a new visit record. Once you click the Save button on the Visit Information screen the additional visit sub-tabs will display.

For more information on the Visit tab and other Injury/Illness tabs, please see COMPLETING A CASE OR VISIT RECORD starting on page 31.

8. Complete as many fields as possible, making sure to fill in all required fields.



9. Click the **Save** button. A confirmation message displays.

Notes

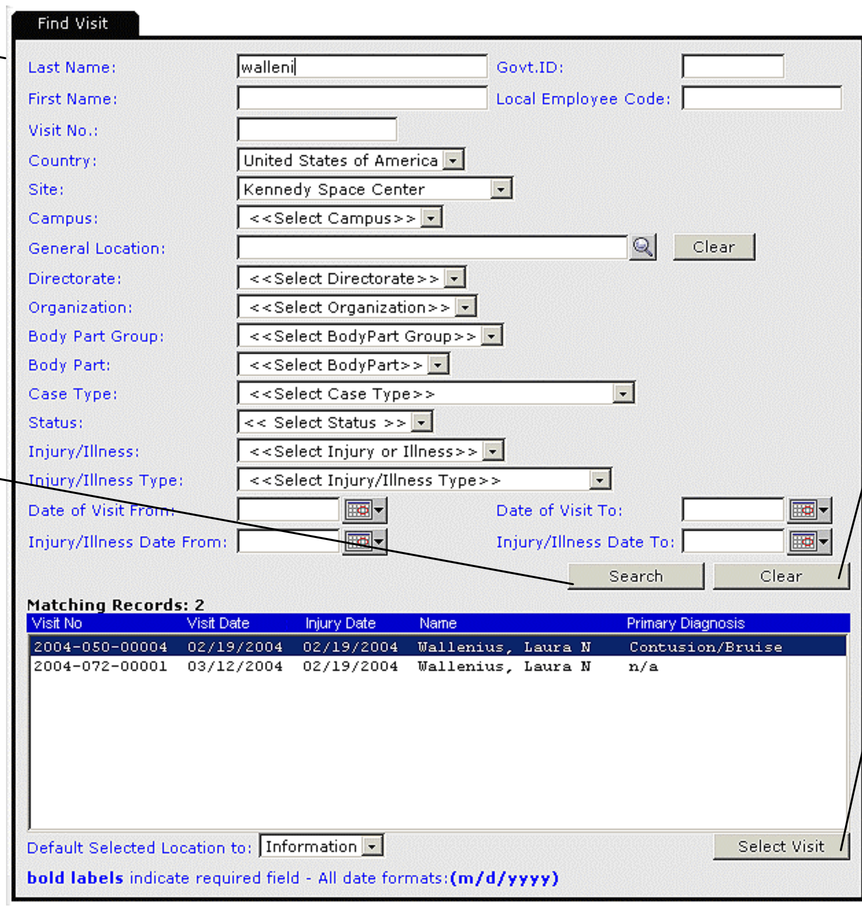
Finding a Visit Record

On a busy day, you may have a steady stream of employees visiting a clinic and may not have time to completely fill out a visit record until later in the day or even later in the week. In this system, that's not a problem. Once you fill out and save the Information sub-tab on the Visit tab, you can find the visit record in the system and complete or edit it at any time. Simply open the **Injury/Illness** drop-down menu. Click on **Visit** to open its drop-down menu. Then click the **Find** option and the Find Visit tab will display.

The Find Visit tab assists you in searching the database, and is similar to the Find Employee tab. It also provides several search criteria that you can use to locate the record. In most cases, entering three characters in any search criteria text field is enough.

1. Specify at least one criterion.

2. Click the **Search** button. A list of matches displays in the 'Matching Records' field.



If the appropriate visit is not listed, click the **Clear** button and repeat search with new criteria.

3. Select the appropriate visit from the list and click the **Select Visit** button or double click the record. The Visit tab for the selected case will display.

Notes

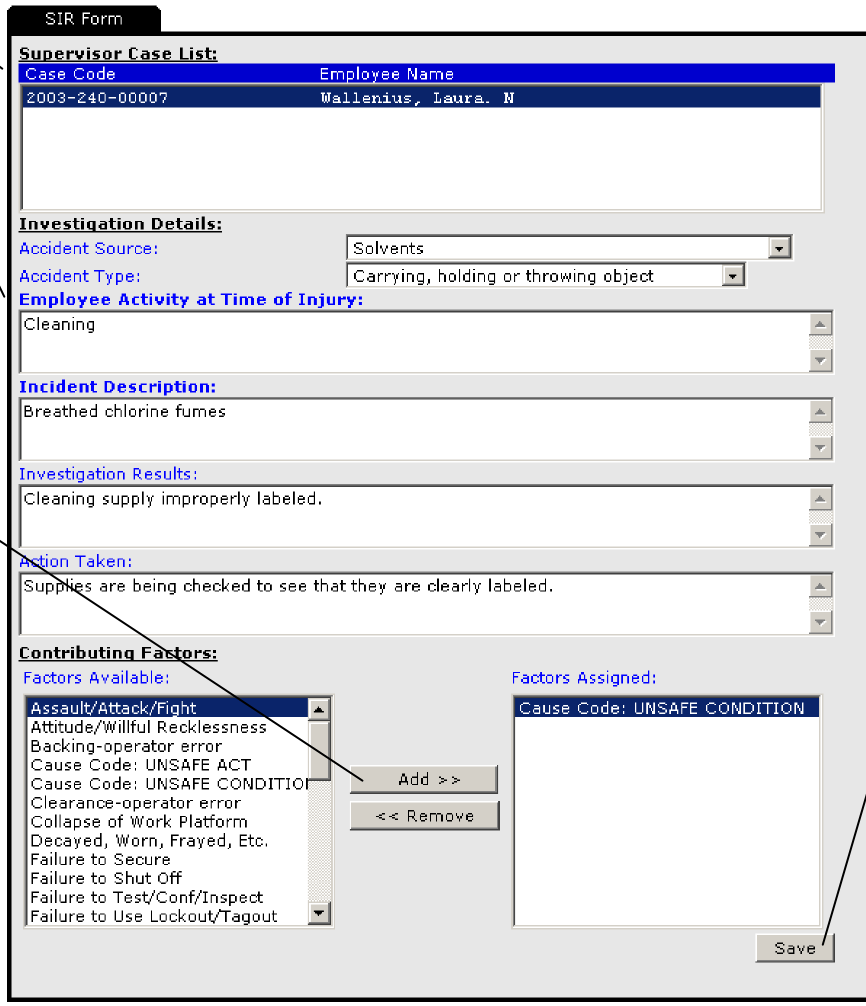
Supervisor Incident Report (SIR)

The Supervisor Incident Report (SIR) allows supervisors to view all Injury/Illness cases associated with their employees. The supervisor may also make changes to this screen, which automatically updates in the original case once the SIR form is saved.

1. Select a case to view.

2. Make changes if necessary.

The **Add** >> button will move a selected factor from the Factors Available list to the Factors Assigned list.

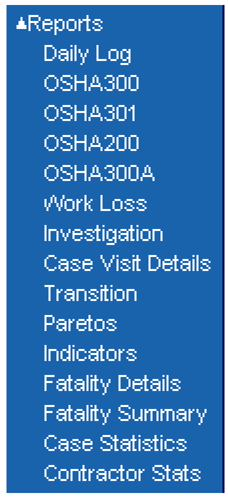


3. Click the **Save** button. Any data changed or added on this screen will automatically transfer to the case record.

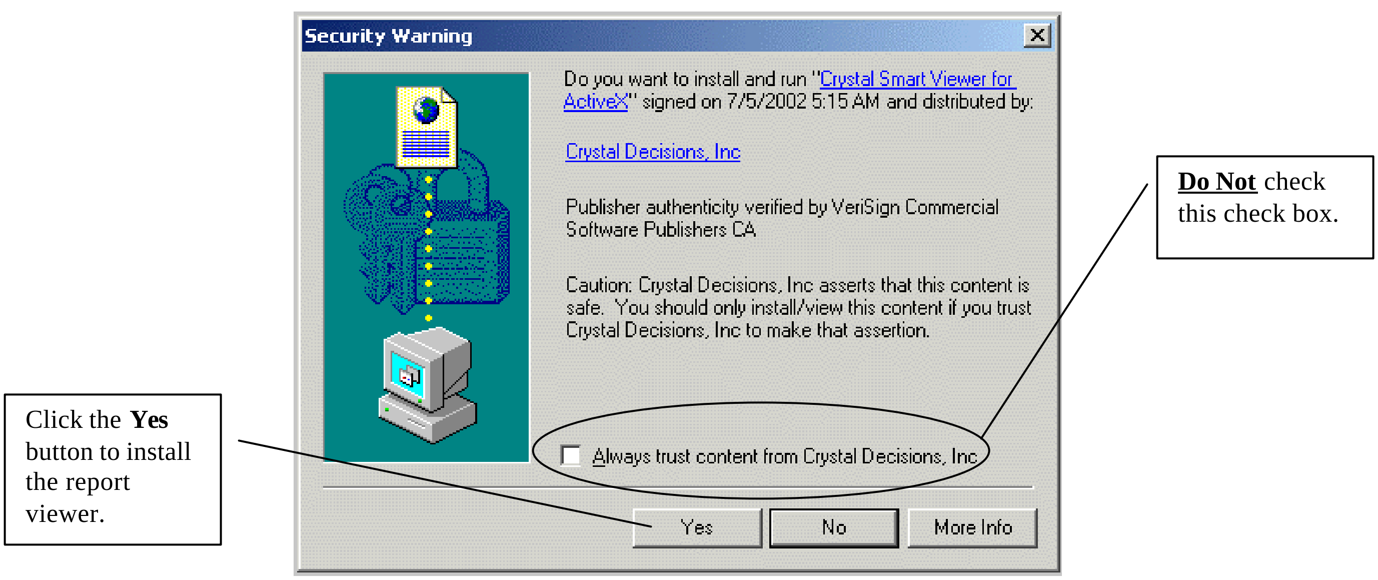
Notes

Running Injury/Illness Reports

Once injury or illness case data has been entered into the system, it can be used to create various reports. The process for running reports is essentially the same for all reports. First select the report you want to run from the Injury/Illness main menu. A Find Report tab will display. Fill in all the information you want to use as your report criteria and click the **Run Report** button.



All reports display in a separate viewer window. If this is the first time you have used the report function on this computer, a pop-up window, shown below, will display offering to install Crystal Smart Viewer to the computer. Once the viewer has been installed the report displays.



All reports display in the Crystal Smart Viewer, the icons available for your use while viewing a report display below. Always remember to use the icons within the viewer window to manipulate your report and not the ones on the browser toolbar.

Icon	Function
	Close the current window
	Print your report
	Export your report into various formats, including Word or Excel
	Modify your report viewing size
	Go to the first page of the report
	Go to the previous page
	Go to the next page
	Go to the last page of the report
	Search the report for specific data or phrases

Notes

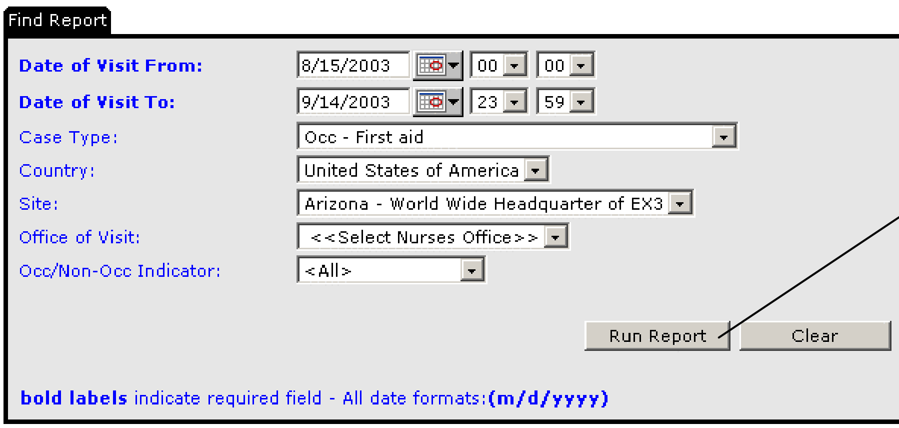
Injury/Illness Reports

On the following pages you will find explanations and examples of the various reports available in the Injury/Illness module.

Daily Log

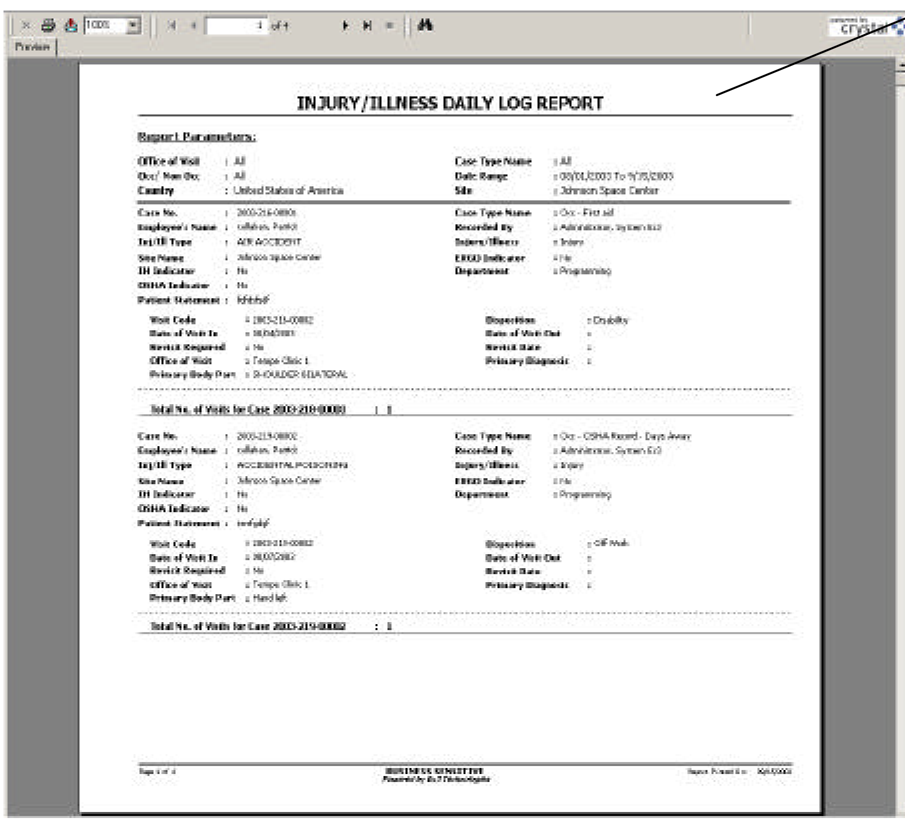
This report gives a summary of each Injury or Illness case record that meets a set of given search criteria.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.

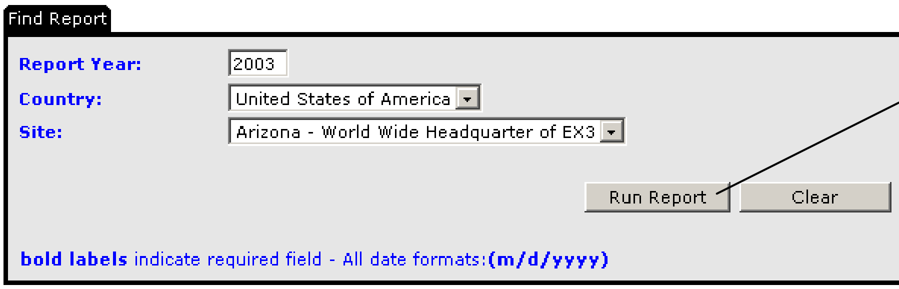
3. This report displays in separate viewing window.



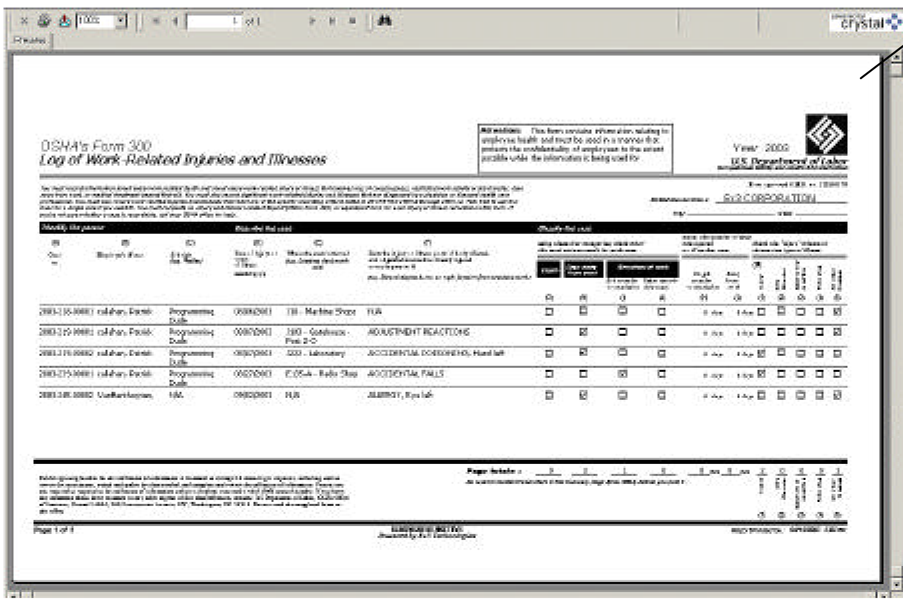
OSHA 300

This report replaced the OSHA 200 as a Log of Work Related Injury and Illnesses. It records all OSHA recordable incidents. It allows users to categorize incidents by year, country and site.

1. Complete <u>all</u> of the data entry fields.



2. Click the **Run Report** button.



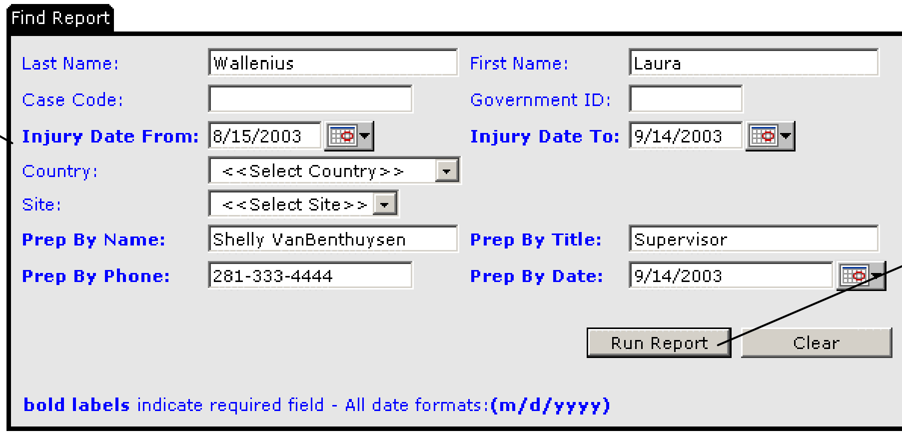
3. This report displays in separate viewing window.

Notes

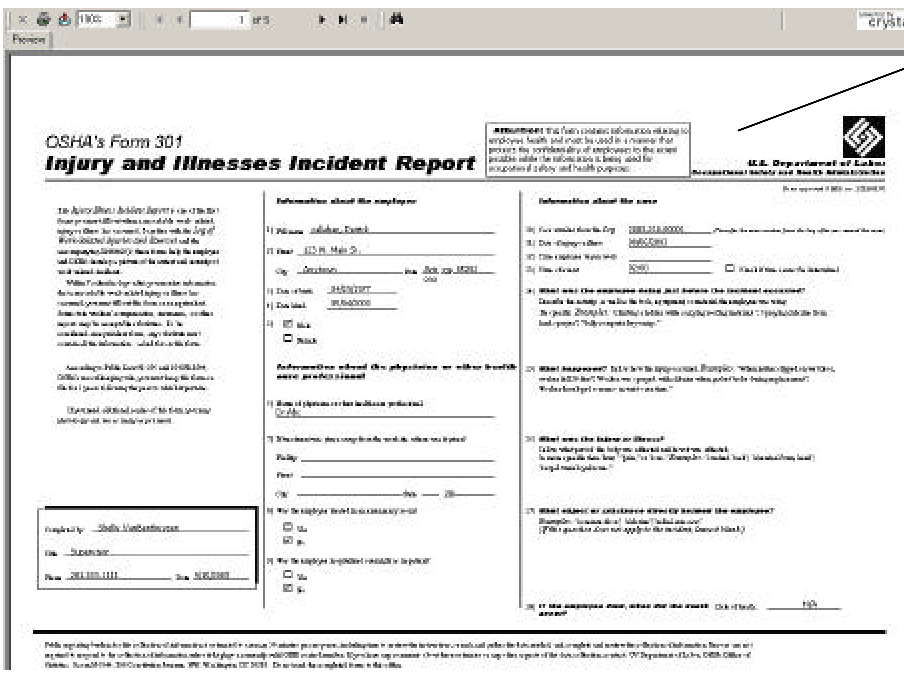
OSHA 301

This report creates an individual OSHA 301 report for a specified injury or illness incident.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.



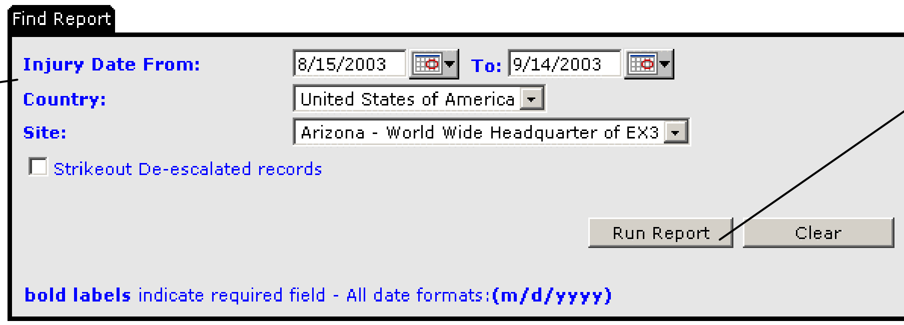
3. This report displays in separate viewing window.

Notes

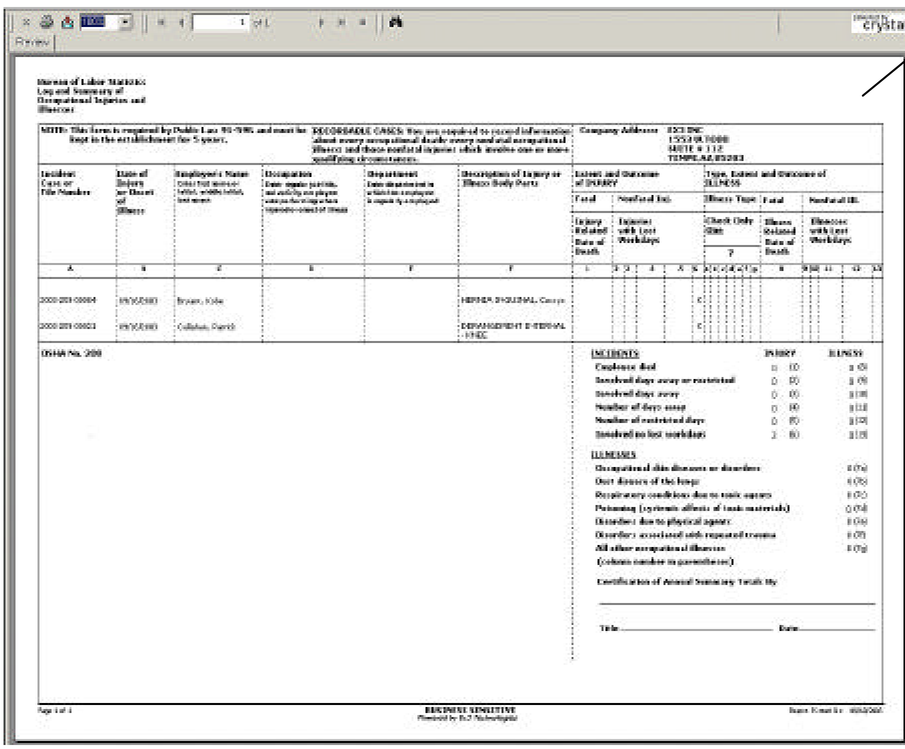
OSHA 200

This report was replaced by the OSHA 300 report. It was the Log of Work-Related Injuries and Illnesses that occurred prior to 2001. Any OSHA recordable incidents from 2001 and earlier will display on this report.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.



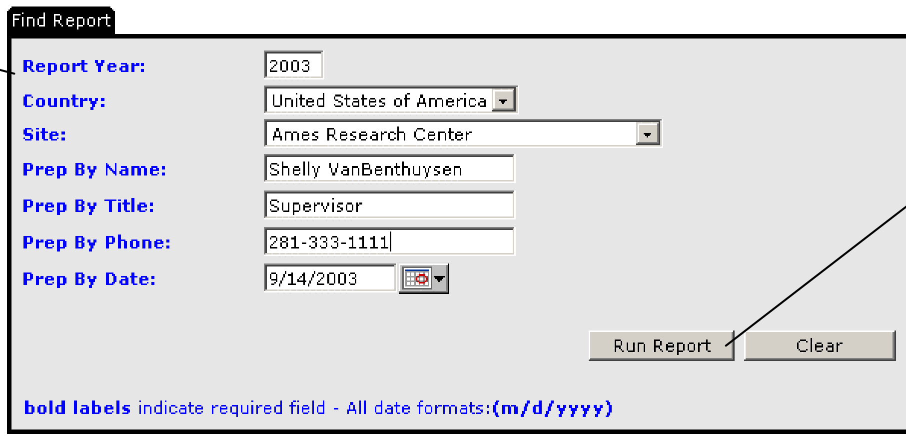
3. This report displays in separate viewing window.

Notes

OSHA 300A

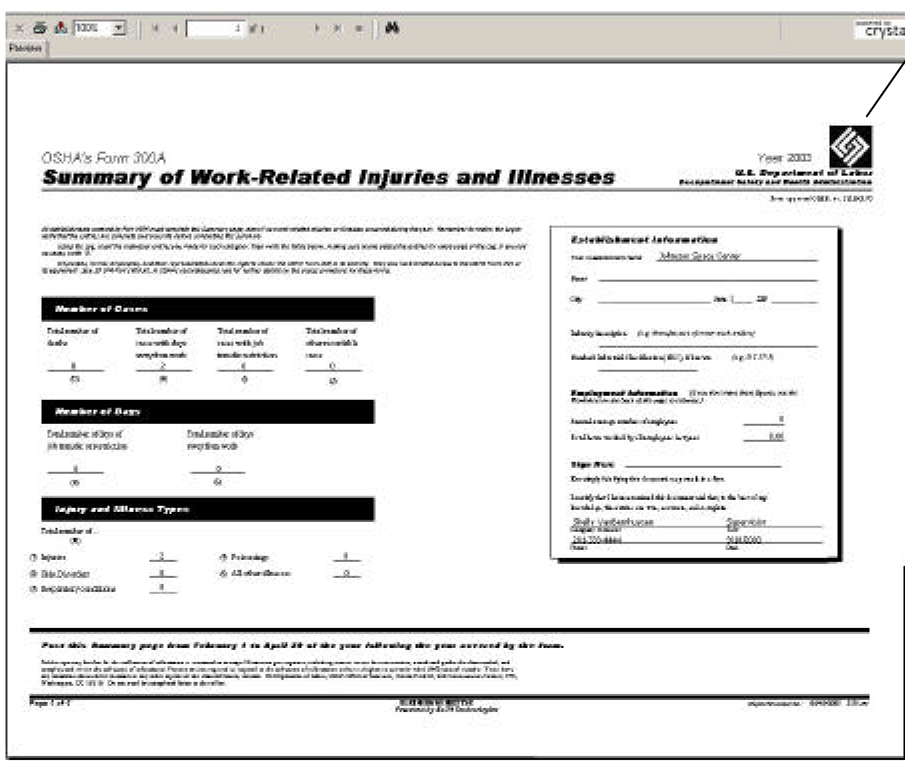
This report creates a summary of all OSHA 300 incidents for a specific year, country and site. This summary report does not include personal data as it is intended to be posted for public view.

1. Complete all of the data entry fields.



2. Click the **Run Report** button.

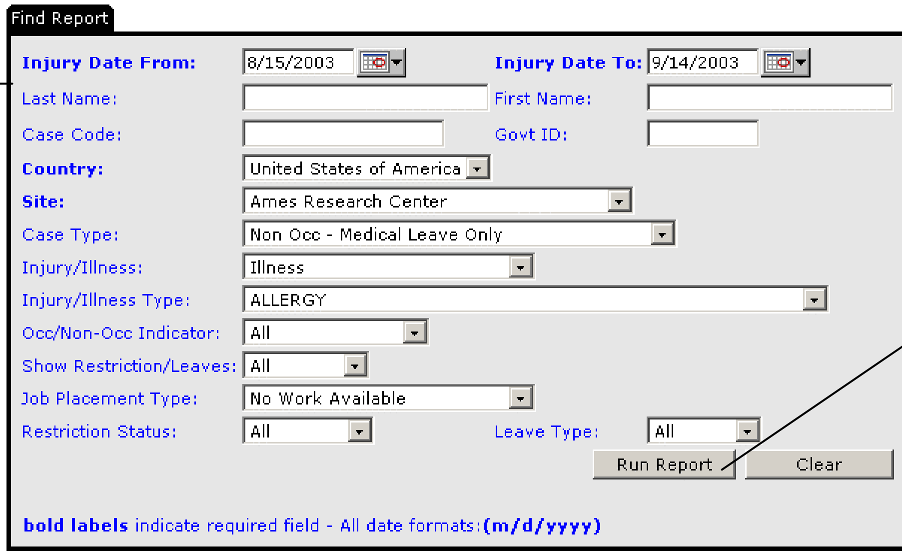
3. This report displays in separate viewing window.



Work Loss Report

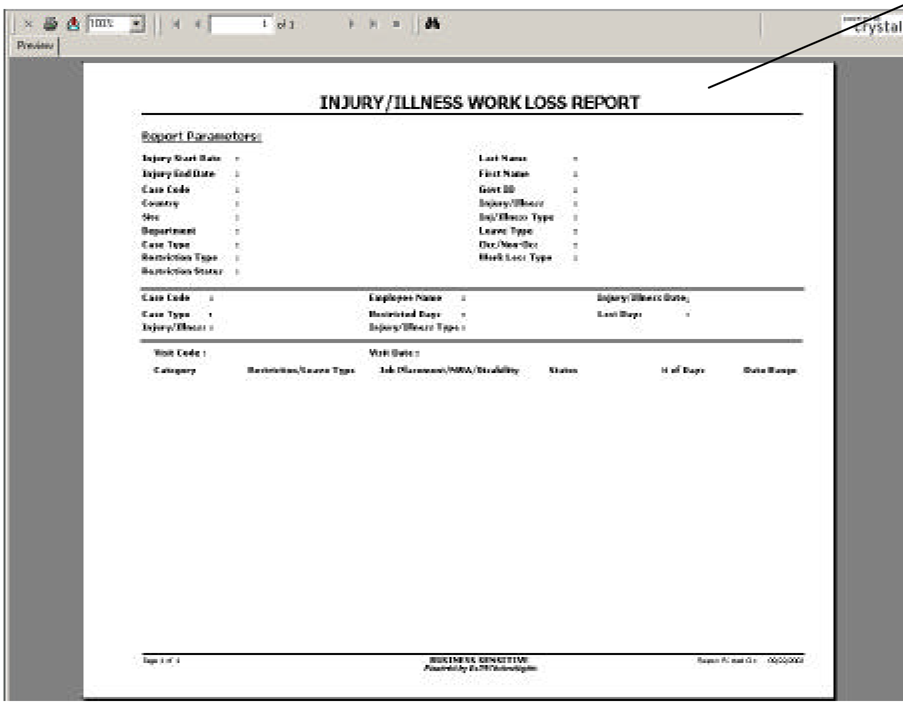
This report lists all incidents that resulted in any lost or restricted workdays.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.

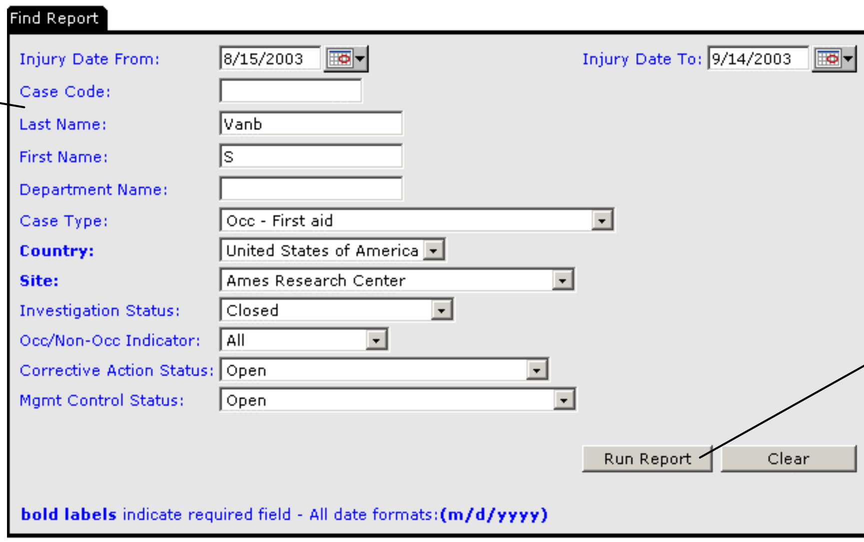
3. This report displays in separate viewing window.



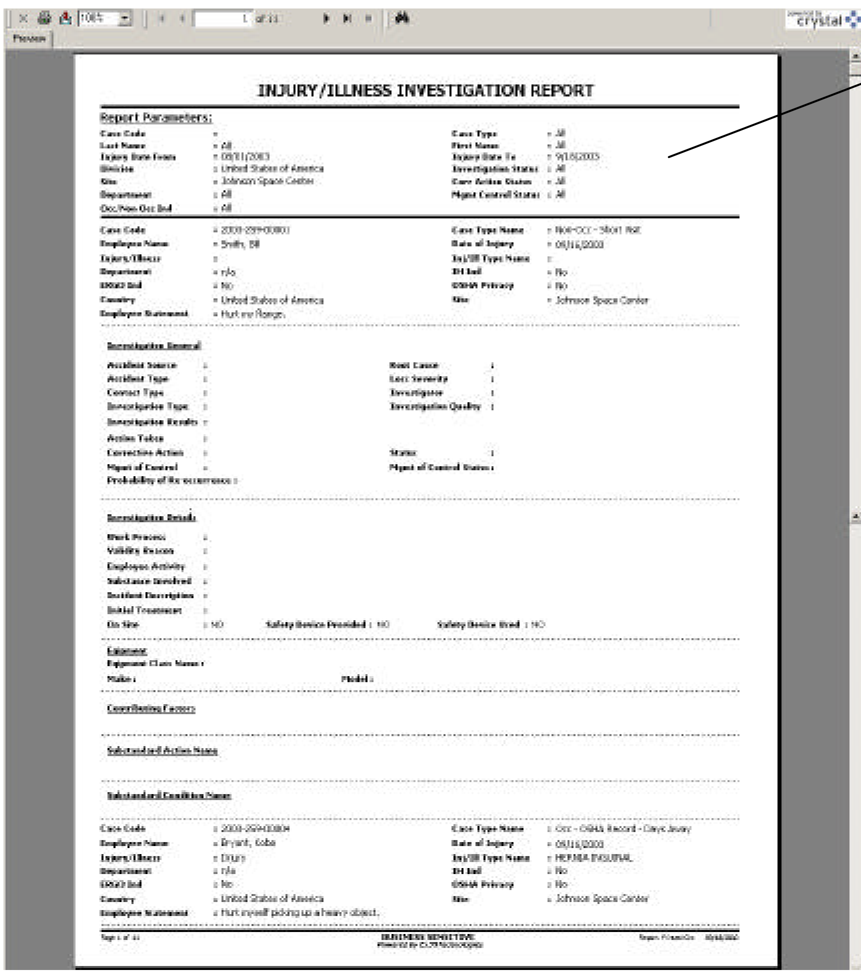
Investigation Report

This report shows the investigation information for all cases that meet the specified search criteria.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.

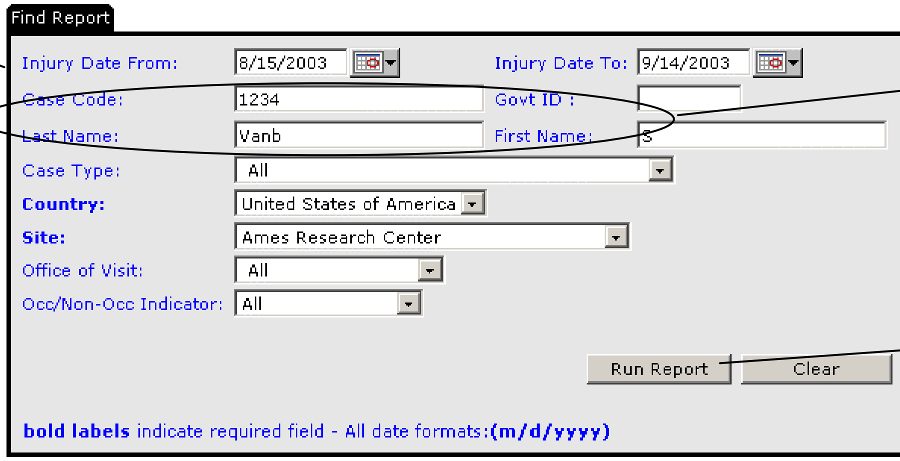


3. This report displays in separate viewing window.

Case Visit Details Report

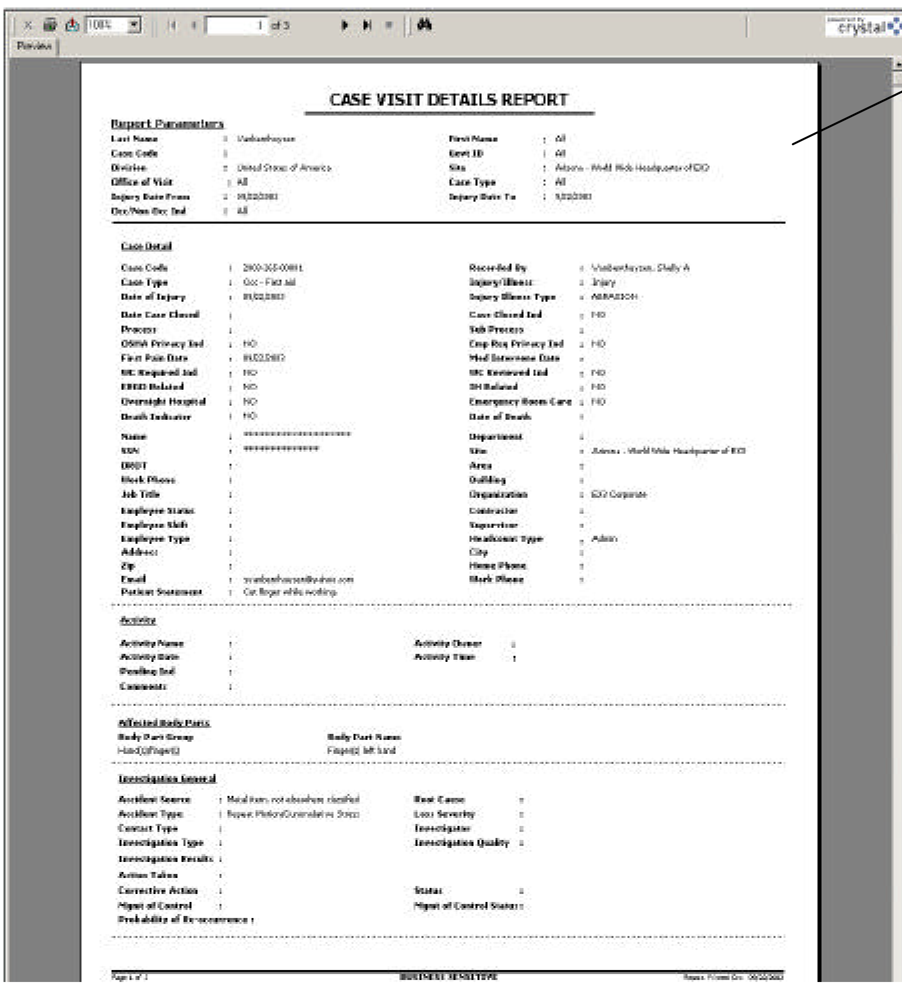
This report creates a detailed summary of an individual case record.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. The use of at least one of the following fields is required: Last Name, First Name, Case Code or Govt ID.

3. Click the **Run Report** Button.

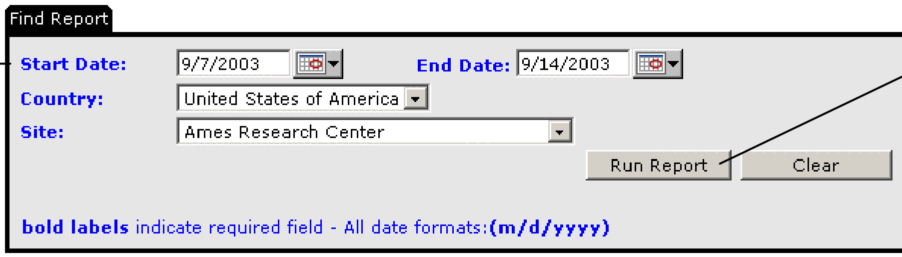


4. This report displays in separate viewing window.

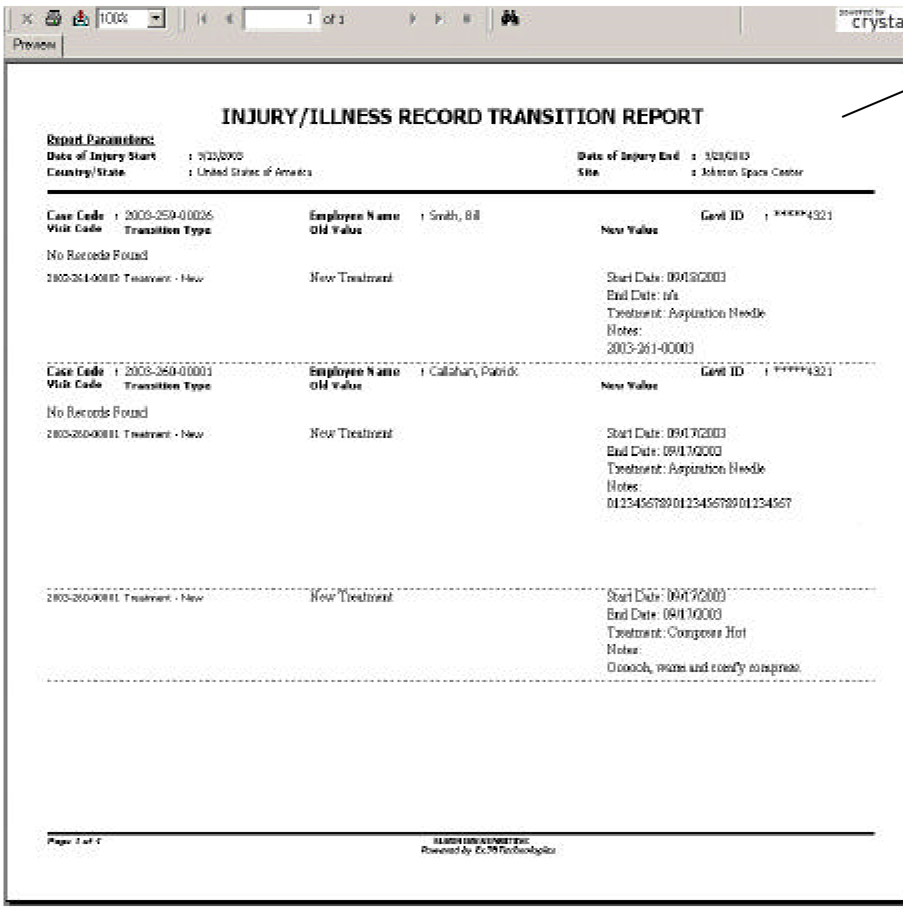
Transition Report

This report shows all changes that have been made to case records during a specified period of time at a certain site. The Start Date and End Dates cannot be more than one week apart.

1. Complete <u>all</u> of the data entry fields.



2. Click the **Run Report** button.


INJURY/ILLNESS RECORD TRANSITION REPORT

Report Parameters:
Date of Injury Start : 9/23/2003
Country/State : United States of America
Date of Injury End : 3/23/2003
Site : Johnson Space Center

Case Code : 2003-259-00026
Visit Code
Transition Type
Employee Name : Smith, Bill
Old Value
New Value
Govt ID : *****4321

No Records Found

2003-261-00003 Treatment - New
New Treatment
Start Date: 09/18/2003
End Date: n/a
Treatment: Aspiration Needle
Notes:
2003-261-00003

Case Code : 2003-260-00001
Visit Code
Transition Type
Employee Name : Callahan, Patrick
Old Value
New Value
Govt ID : *****4321

No Records Found

2003-260-00001 Treatment - New
New Treatment
Start Date: 09/17/2003
End Date: 09/17/2003
Treatment: Aspiration Needle
Notes:
0123456789012345678901234567

2003-260-00001 Treatment - New
New Treatment
Start Date: 09/17/2003
End Date: 09/17/2003
Treatment: Compress Hot
Notes:
Ooooch, warm and comfy compress.

Page 1 of 1
Powered by Ex3Technologies

3. This report displays in separate viewing window.

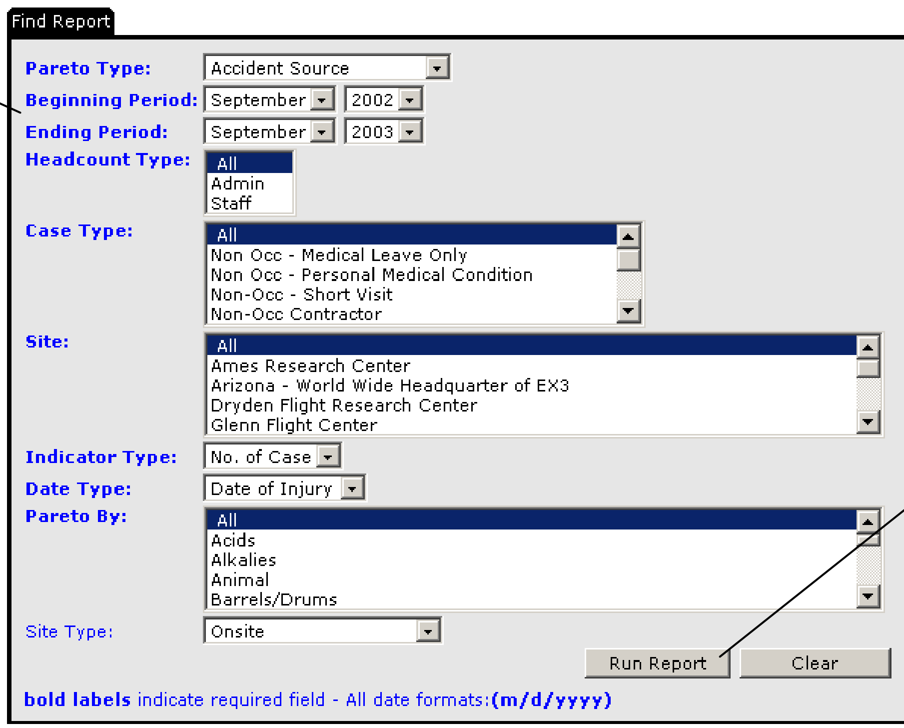
Notes

Paretos Report

This report is a bar chart that displays the most frequently occurring or largest item at the left of the chart, with smaller or less frequent items displaying in descending order to the right. This visual representation allows the user to see problem areas quickly.

You can build a pareto report from just about any of the drop-down lists within the application. This allows you to create reports that can answer specific questions such as “What types of accidents are happening to people in the ABC organization?” or “What is the primary source of all accidents at ABC site?” Also, the multi-select lists (for example, Case Type, Site and Pareto By) allow you to choose one, several, or all the values in the drop-down list. Use the standard CTRL + Click or Shift + Click combinations to select a collection or a list of values within a list box.

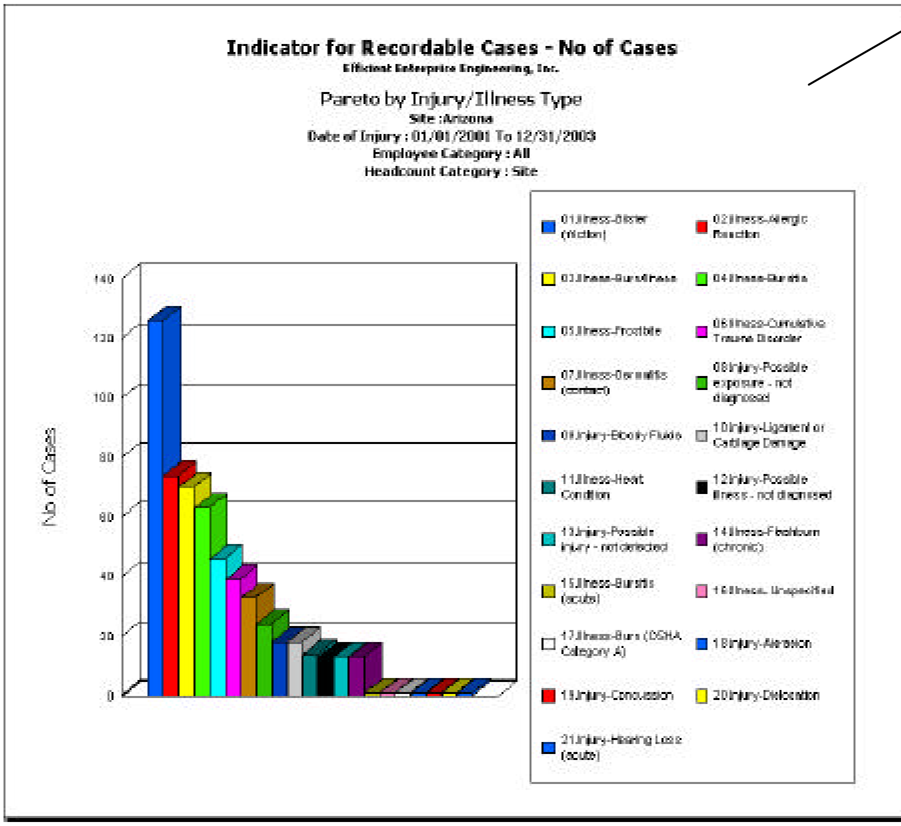
1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.

Paretos Report Cont'd

3. This report displays in separate viewing window.



Efficient Enterprise Engineering, Inc.

Pareto by Injury/Illness Type

Site :Arizona

Date of Injury : 01/01/2001 To 12/31/2003

Employee Category : All

Headcount Category : Site

	Total	Illness- Unspecified	Illness-Allergic Reaction	Illness-Blister (friction)	Illness-Burn (OSHA Category A)	Illness-Burn/Illness	Illness-Bursitis	Illness-Bursitis (acute)	Illness-Cancer	Illness-Cumulative Trauma Disorder
Total for Company	1923	123	386	335	311	30	176	46	14	149
Total for selected Sites	571	1	74	126	1	70	63	1	0	39
Arizona	571	1	74	126	1	70	63	1	0	39

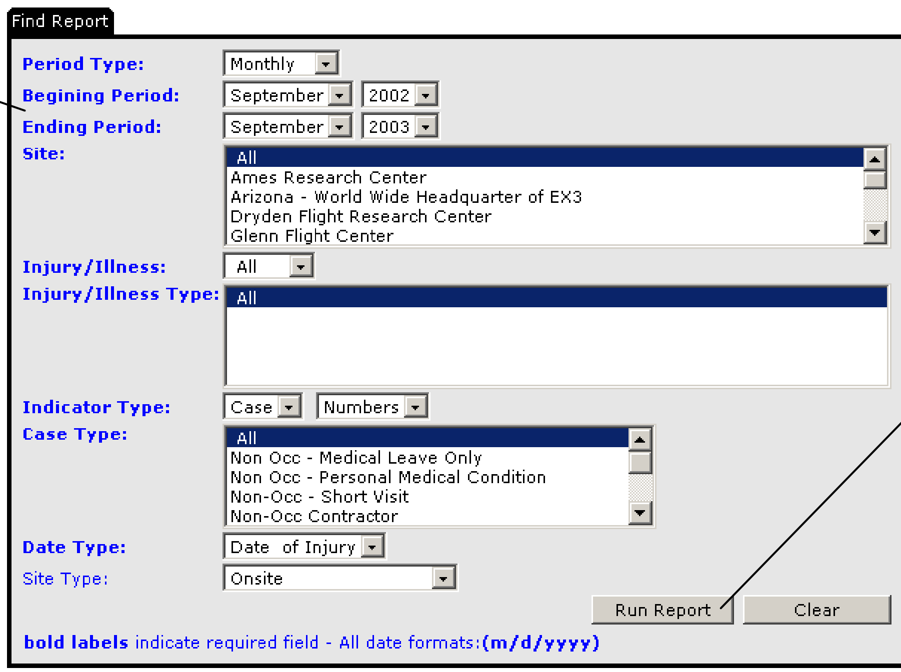
Notes

Indicators Report

This report creates a bar graph plotting the information in sequential or alphabetic order. This report is good at showing trends of an item over time. While a Pareto report is more flexible in allowing you to select exact specifications for a chart, the indicators chart produces many widely used reports, such as, “What is the case rate for occupational cases in Arizona for the first quarter of 2001?”

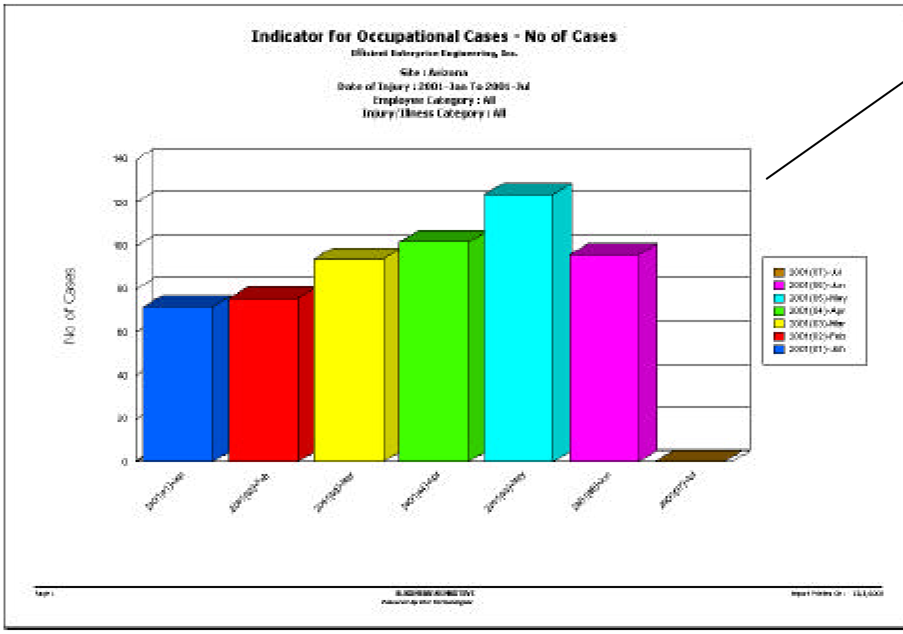
The Find Report screen allows for choosing multiple items in certain drop-down lists. Choosing multiple items produces a stacked bar chart, with different colors assigned to each of the selected items.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.

Indicator's Report, cont'd.



3. This report displays in separate viewing window.

Indicator for Occupational Cases - No of Cases

Efficient Enterprise Engineering, Inc.

Site : Arizona

Date of Injury : 2001-Jan To 2001-Jul

Employee Category : All

Injury/Illness Category : All

	Total for Period	2001(01)-Jan	2001(02)-Feb	2001(03)-Mar	2001(04)-Apr	2001(05)-May	2001(06)-Jun	2001(07)-Jul
Total For Company	1,698	223	274	257	298	348	296	2
Total for selected Sites	564	72	76	94	102	124	96	0
Arizona	564	72	76	94	102	124	96	0

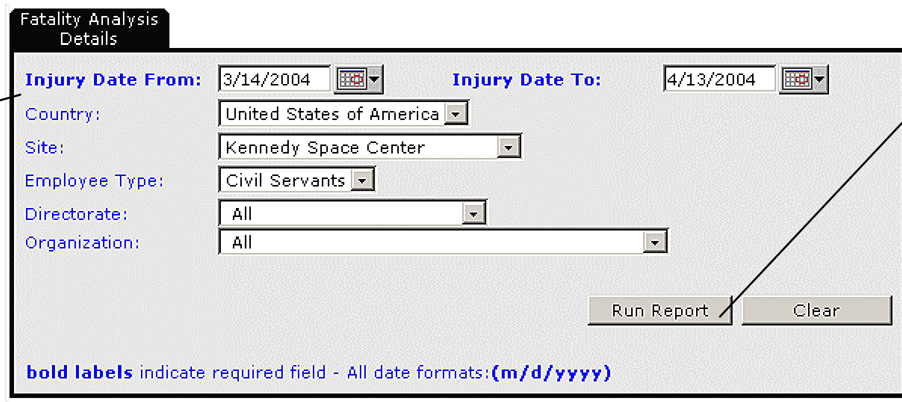
BUSINESS SENSITIVE

Notes

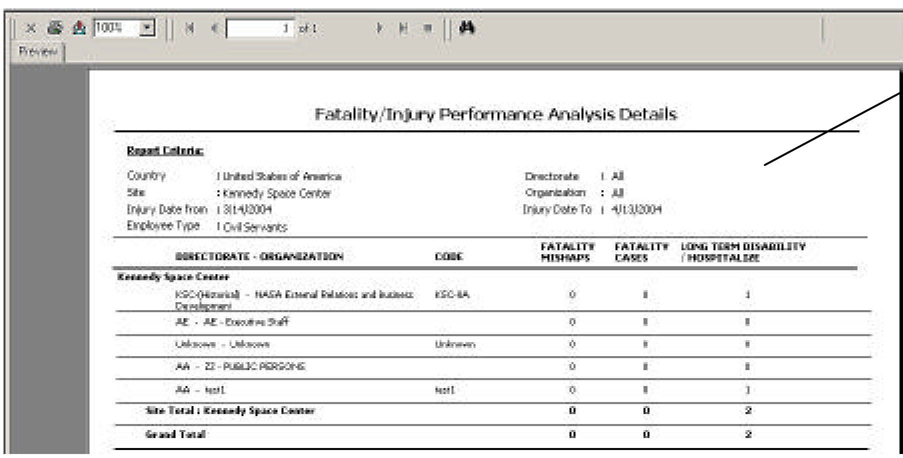
Fatality Details Analysis

This report produces a table listing the total number of fatality mishaps, fatality cases and long term disabilities/hospitalizations recorded for a specific site during a given time frame. You may indicate a specific employee type, which allows you to run reports for a specific directorate/organization or by contractor/contract number.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.



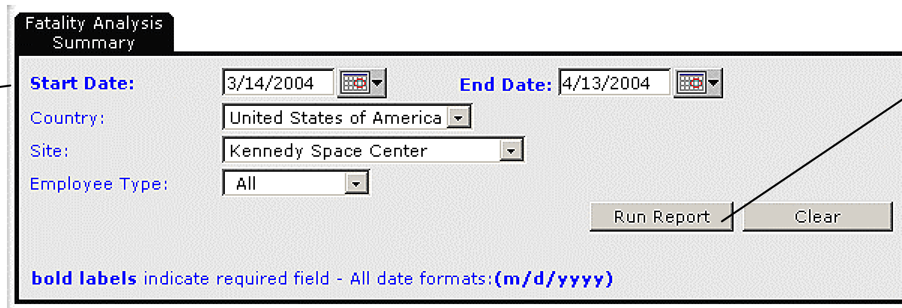
3. This report displays in separate viewing window.

Notes

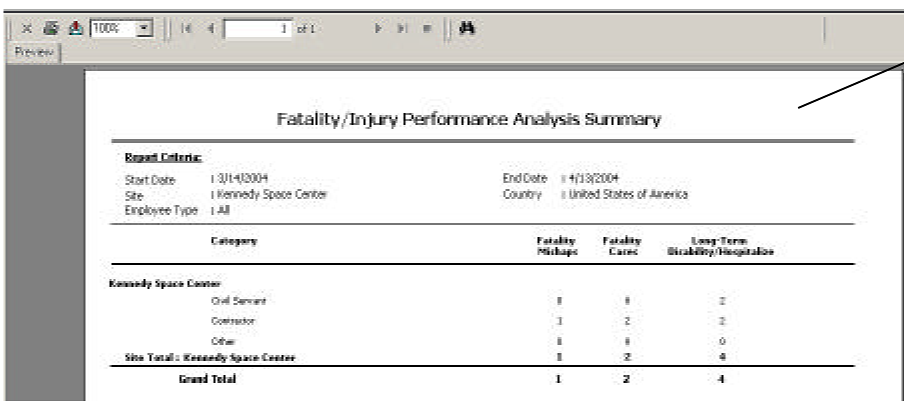
Fatality Summary Analysis

This report shows the total number of fatality mishaps, fatality cases and long term disability cases by employee type for a given time period.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.



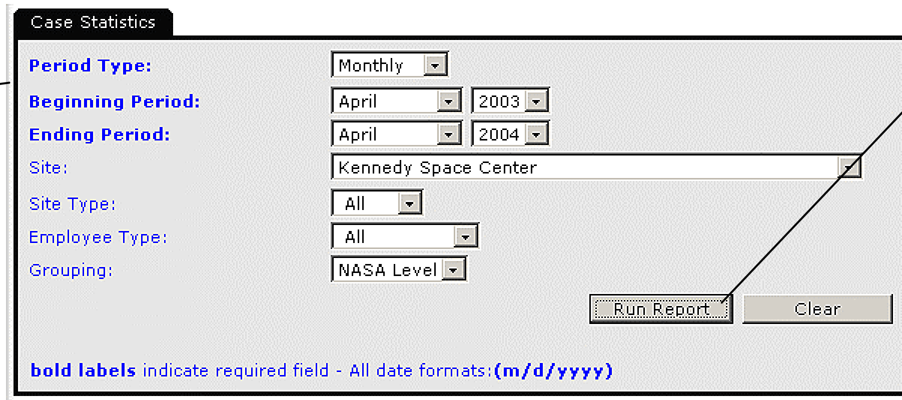
3. This report displays in separate viewing window.

Notes

Case Statistics

This report shows the count and rate for all of the injury/illness case types for a given site over a specified period of time. You may indicate a specific employee type, which allows you to run reports for a specific directorate/organization or by contractor/contract number.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.

3. This report displays in separate viewing window.

Case Statistics Report

Report Parameters:

DATE RANGE : 2003-Apr To 2004-Apr
SITE : Kennedy Space Center
SITE TYPE : All
PERIOD : Monthly
CATEGORY : All
GROUPING : NASA Level

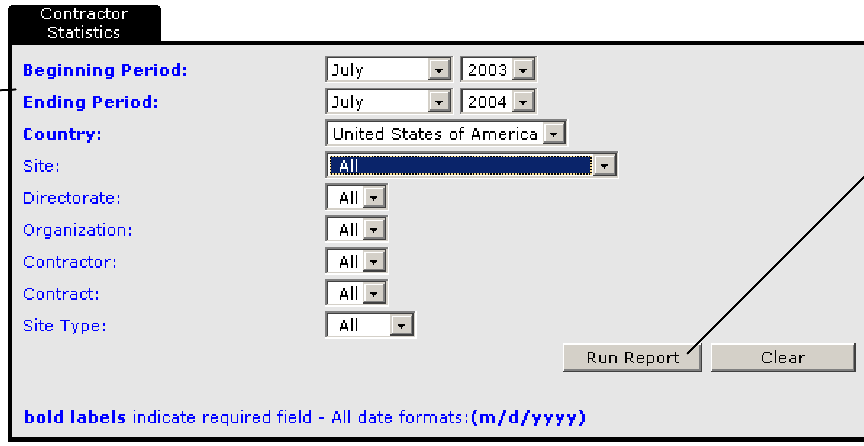
	Total Cases		Occ Cases		Non-Occ Cases		First Aid Cases		Fatality Cases		Related Incidents		Lost Time Cases		Lost Time		Restricted Cases		Restricted		Hours Worked	Head Count
	Count	Rate	Count	Rate	Count	Rate	Count	Rate	Count	Rate	Count	Rate	Count	Rate	Days	Rate	Count	Rate	Days	Rate		
2003(04)-Apr	35	23.50	35	23.50	0	0.00	2	1.34	0	0.00	35	23.50	6	4.03	144	96.68	8	5.37	187	125.55	297878.00	1658
2003(05)-May	24	17.38	24	17.38	0	0.00	3	2.17	0	0.00	24	17.38	5	3.62	228	165.09	6	4.34	79	57.20	276205.00	1658
2003(06)-Jun	26	16.37	26	16.37	0	0.00	13	8.19	0	0.00	26	16.37	3	1.89	33	20.78	4	2.52	139	87.53	317619.00	1906
2003(07)-Jul	22	15.65	22	15.65	0	0.00	3	2.13	0	0.00	22	15.65	4	2.85	130	92.47	3	2.13	99	70.42	281161.00	1906
2003(08)-Aug	24	17.44	24	17.44	0	0.00	3	2.18	0	0.00	24	17.44	2	1.45	12	8.72	3	2.18	203	147.52	275223.00	1906
2003(09)-Sep	22	15.00	22	15.00	0	0.00	2	1.36	0	0.00	22	15.00	3	2.04	60	40.90	1	0.68	90	61.35	293422.00	1906
2003(10)-Oct	21	14.55	21	14.55	0	0.00	2	1.39	0	0.00	21	14.55	2	1.39	17	11.78	2	1.39	13	9.01	288659.00	1850
2003(11)-Nov	14	12.71	14	12.71	0	0.00	1	0.91	0	0.00	14	12.71	2	1.82	13	11.81	3	2.72	81	73.56	220243.00	1850
2003(12)-Dec	12	9.60	12	9.60	0	0.00	2	1.60	0	0.00	12	9.60	3	2.40	8	6.40	4	3.20	67	53.60	250000.00	1850
2004(01)-Jan	13	21,311.48	13	21,311.48	0	0.00	4	6,557.38	0	0.00	13	21,311.48	0	0.00	0	0.00	0	0.00	0	0.00	122.00	122
2004(02)-Feb	5	0.00	3	0.00	2	0.00	2	0.00	0	0.00	0	0.00	1	0.00	56	0.00	0	0.00	0	0.00	0.00	0
2004(03)-Mar	21	11,898.02	14	7,932.01	7	3,966.01	1	566.57	1	566.57	7	3,966.01	3	1,699.72	1118	633,427.76	0	0.00	12	6,798.87	353.00	242
2004(04)-Apr	13	0.00	8	0.00	5	0.00	3	0.00	2	0.00	4	0.00	1	0.00	44	0.00	1	0.00	30	0.00	0.00	0
GROUP TOTALS	252	20.15	238	19.03	14	1.12	41	3.28	3	0.24	224	0.00	35	2.80	1863	148.99	35	2.80	1000	79.97	2500885.00	1296
GRAND TOTALS	252	20.15	238	19.03	14	1.12	41	3.28	3	0.24	224	23.50	35	2.80	1863	148.99	35	2.80	1000	79.97	2500885.00	1296

Notes

Contractor Statistics

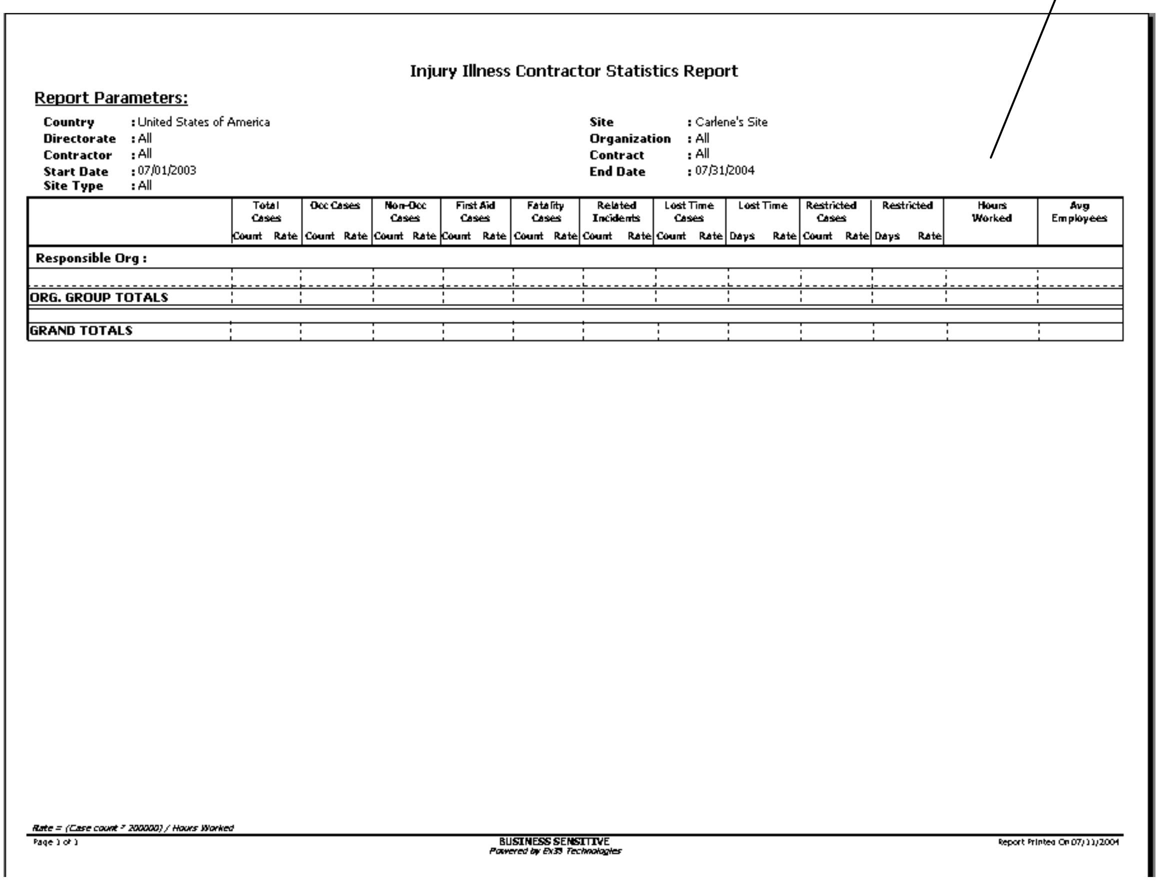
This report shows the count and rate for all of the injury/illness case types for contractors at a given site over a specified period of time. You may indicate a specific directorate/organization, contractor/contract number and site type. This allows you to run reports specific to one contractor or directorate.

1. Complete as many fields as possible, making sure to fill in all required fields.



2. Click the **Run Report** button.

3. This report displays in separate viewing window.



Injury Illness Contractor Statistics Report

Report Parameters:

Country	: United States of America	Site	: Carlene's Site
Directorate	: All	Organization	: All
Contractor	: All	Contract	: All
Start Date	: 07/01/2003	End Date	: 07/31/2004
Site Type	: All		

	Total Cases		Occ Cases		Non-Occ Cases		First Aid Cases		Fatality Cases		Related Incidents		Lost Time Cases		Lost Time		Restricted Cases		Restricted		Hours Worked	Avg Employees
	Count	Rate	Count	Rate	Count	Rate	Count	Rate	Count	Rate	Count	Rate	Count	Rate	Days	Rate	Count	Rate	Days	Rate		
Responsible Org :																						
ORG. GROUP TOTALS																						
GRAND TOTALS																						

Rate = (Case count * 200000) / Hours Worked

Page 1 of 1

BUSINESS SENSITIVE
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Report Printed On 07/11/2004

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Exploring the Action Request Module

- **Creating a General Action Request**
- **Assigning Employees to an AR**
- **Managing Action Requests**
- **Creating Distribution Lists**
- **Running Action Request Reports**

The Action Request Management Module enables you to assign, track, and report on tasks throughout your organization. You can assign general tasks, such as requesting that new safety procedures be posted at workstations. You can also assign tasks that are related to a specific injury/illness or safety incident, such as requesting an update on an investigation. Using automated eMail, you can send notification of hazards, unsafe conditions, and regulatory requirements. This feature will help you improve the effectiveness of your communications, increase accountability and task follow-through.

The following options display in the Action Request Menu:

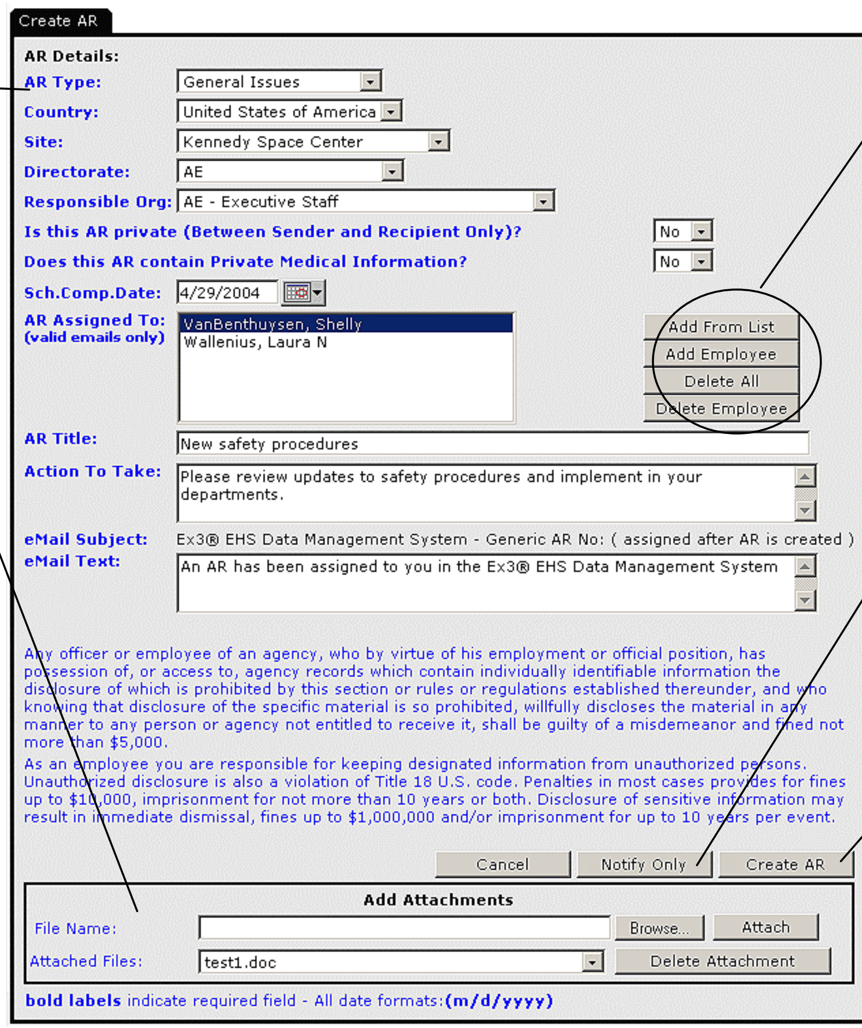
Creating a General Action Request

To create a new Action Request (AR), you first go to the main menu and select the **Action Request** menu. From the **Action Request** drop-down menu, select the **Create** feature. The Create Action Request tab displays.

This screen allows you to assign an action request to one or more recipients. The recipients receive an eMail notifying them of your action request. You may also attach any documents that might be necessary or helpful to complete the task.

1. Complete all required fields shown in blue.

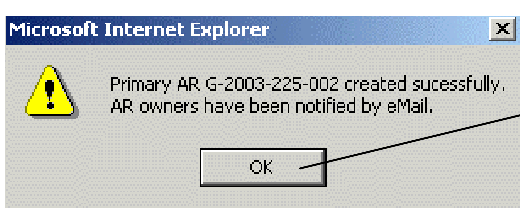
2. Attach any documents that may be relevant to the AR. They will be sent along with the eMail notification



See ASSIGNING EMPLOYEES TO AN AR starting on page 88 for information on using these buttons.

The **Notify Only** button allows you to send the AR information without creating an actual AR that is tracked by the system.

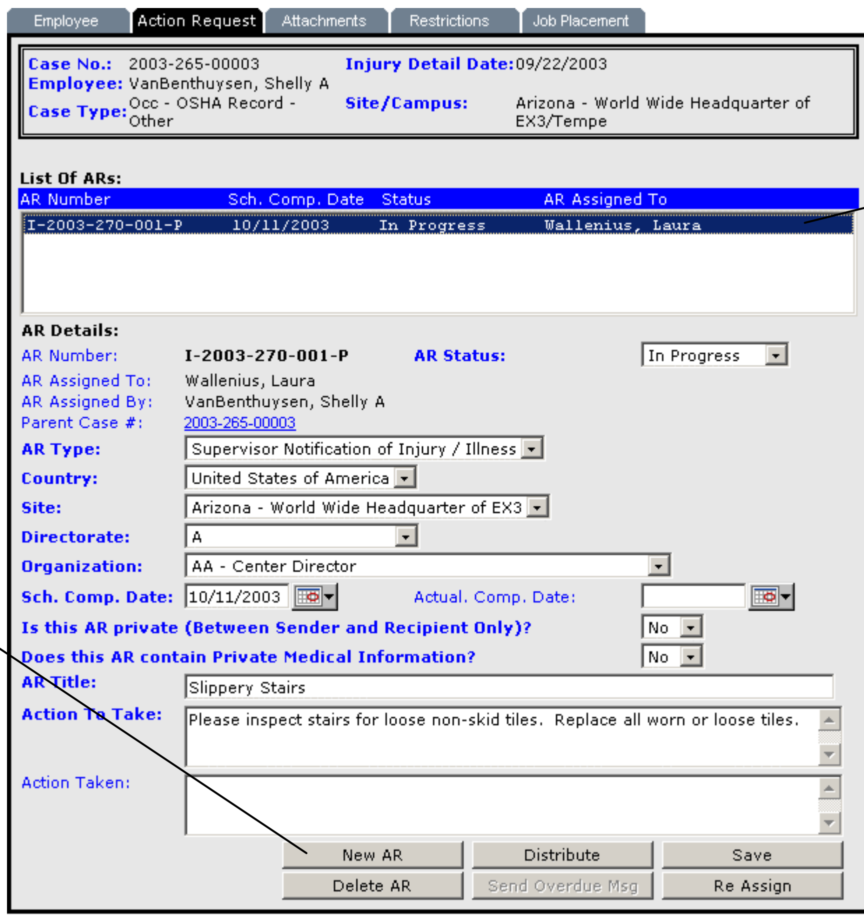
3. Click the **Create AR** button to create and send the AR.



4. A pop-up box verifies that your AR was created. Click **OK**.

Creating an Incident Specific Action Request

Action requests that are directly related to an injury/illness or a safety incident are created within those modules. To create a new AR simply open the incident and click on the **Action Request** tab. An AR screen similar to the one below will display. Click **New AR**. A Create AR screen will display. Follow the steps on the previous page to complete the Create AR screen.



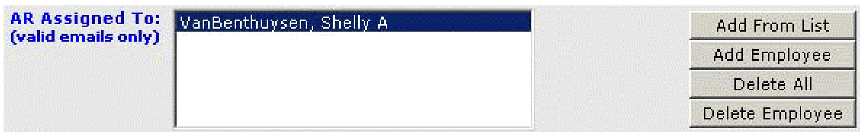
Once an AR is created for an incident it will display in the List of ARs field.

To create a new AR for this case, click the **New AR** button. The screen will black out and the Create AR screen will display.

Notes

Assigning Employees to an AR

The “AR Assigned To” field on the Create AR screen can be filled with one or more employees. Use the buttons to the right of this field to add or delete as many employees as necessary.

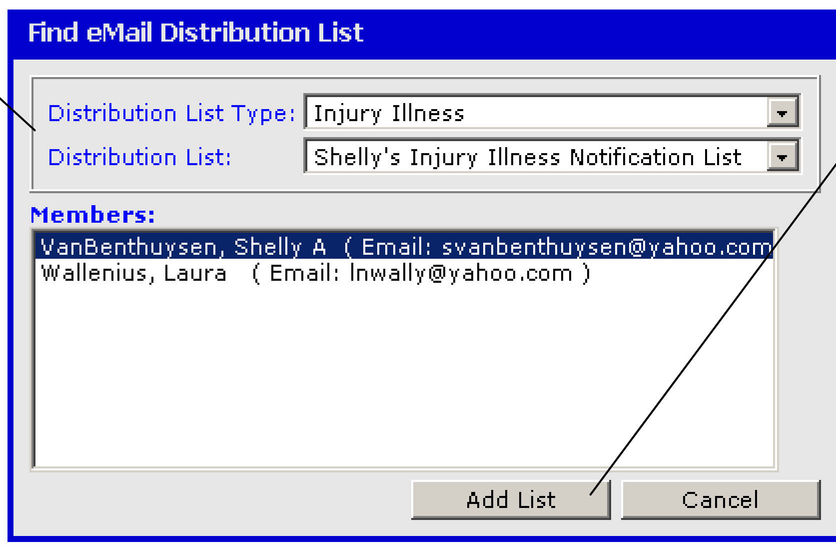


Add from List Button

Use this button to assign a set list of employees. The screen below displays in a separate pop-up box when you click the **Add from List** button. If you can’t find an appropriate list, you may create one using the Distribution List function within the Action Request module.

For more information on creating distribution lists see CREATING DISTRIBUTION LISTS beginning page 95.

1. Select the distribution type and list using the drop-down boxes.



2. Click the **Add List** button to import the Members list to the AR Assigned To field.

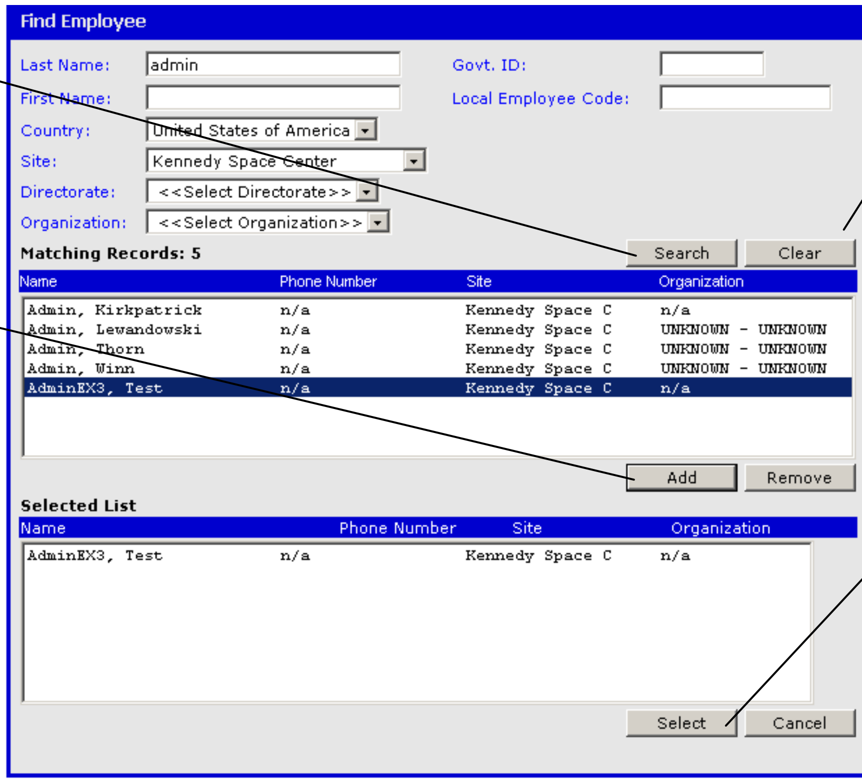
Notes

Assigning Employees to an AR, cont'd.

Add Employee Button
Use this button if you require only one employee or if you need to select employees that are not part of a distribution list. The Find Employee screen displays in a separate pop-up box when you click the **Add Employee** button.

1. Complete at least one search criteria field. Then click the **Search** button.

2. All employees that match your search display in the Matching Records field. Highlight the correct employee and click the **Add** button.



3. Click the **Clear** button to clear the search criteria fields. Repeat steps 1 and 2 until all employees needed have been selected.

4. When the Selected List field contains all needed employees click the **Select** button. Your selections will be imported to the AR Assigned to field.

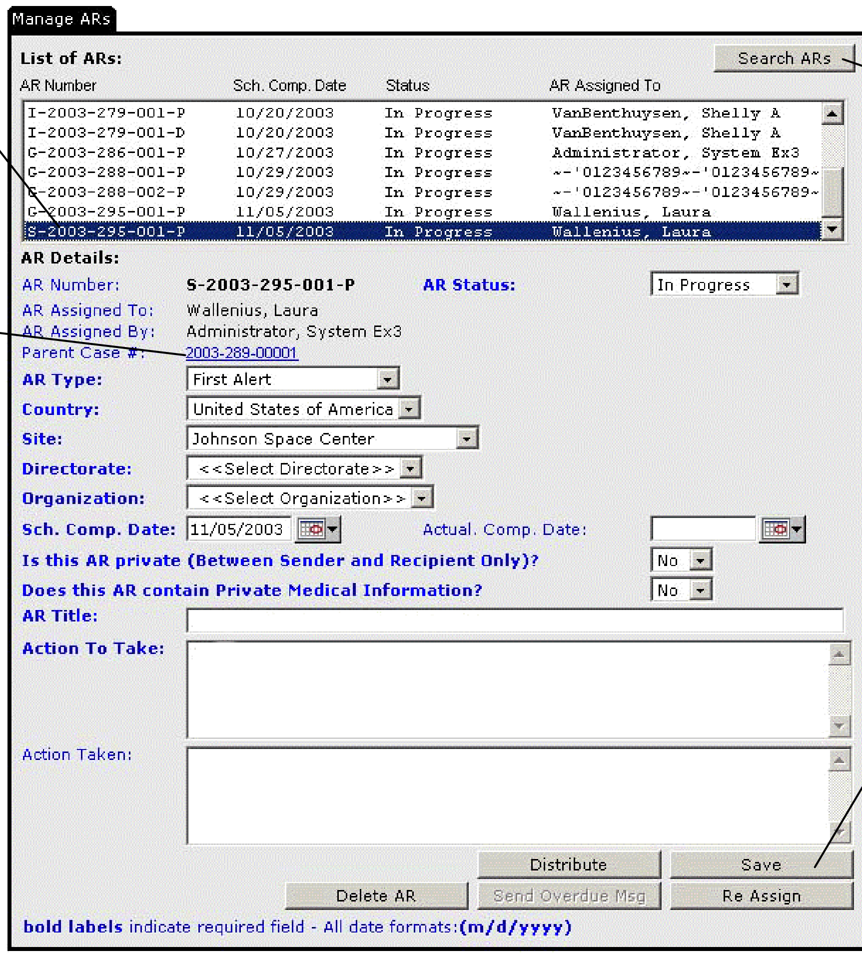
Notes

Managing Action Requests

The Manage Action Request feature, allows you to view and update any Action Requests that have been assigned to you or that you have assigned to others. You can send notices out when requests are overdue, distribute ARs to others, and re-assign ARs that have been assigned in error from this screen. This allows you to track and manage an AR from start to finish.

Highlight an AR on the list to view its details below.

Click the Parent Case # link to open the incident record associated with this AR.



Filter the List of ARs list based on your needs. See page 91 for information on the **Search ARs** button.

Save any changes made to this screen before exiting.

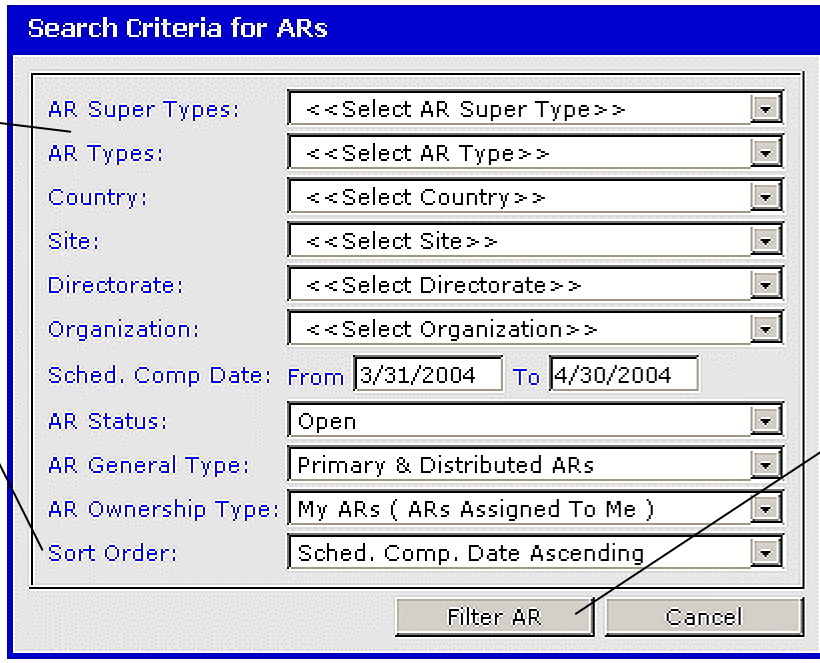
Notes

Managing Action Requests, cont'd.

Search AR Button
When you select **Manage** from the Action Request menu, the system will automatically bring up all ARs assigned by you or to you. You may modify this list of ARs by clicking the **Search AR** button. A search criteria screen like the one below will display in a separate window.

1. Complete as many of the criteria fields as you need.

2. Select a sort order to arrange the search results, as you need them.



3. Click the **Filter AR** button. The List of ARs field will change based on your search criteria.

Notes

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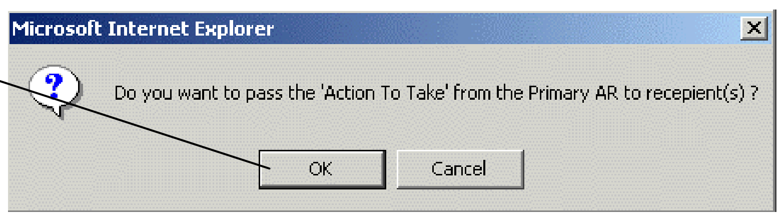
Distribute Button
In certain cases an Action Request might be assigned to one employee and then distributed to others. For example a manager may receive notification of an unsafe stairwell in his building. Since he does not actually perform maintenance, he would then distribute this action request to one of his subordinates for completion.

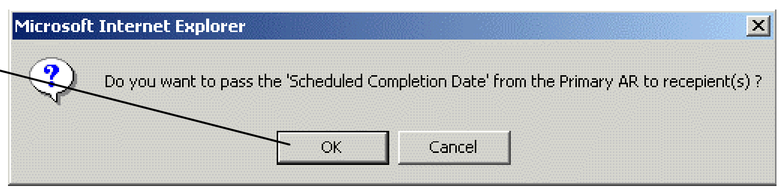
You may distribute an AR using the Manage ARs screen within the Action Request module or from the Action Request tab within an injury/illness or safety incident. Whichever method you select, the process for distributing an AR is the same. Click the **Distribute button** at the bottom of the screen. A series of pop-up boxes display.

1. Click **OK** if you would like to use the same "AR Title".

2. Click **OK** if you would like to use the same "Action To Take" information.



3. Click **OK** if you would like to use the same "Scheduled Completion Date".

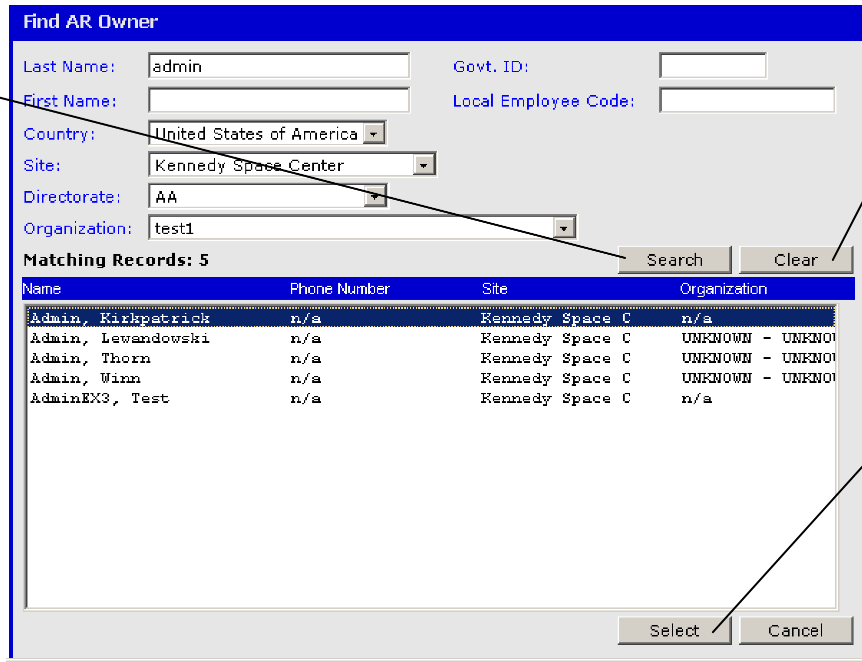


The Create AR screen displays after the third pop-up box. Select the employee(s) you want to distribute the AR to and modify any fields to fit your needs. Click the **Create AR** button. A verification pop-up displays. Click **OK** to return to the Manage AR screen.

Re-Assign Button

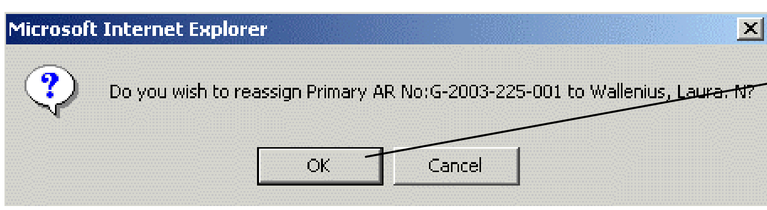
In some cases action requests may have been assigned incorrectly. Re-assigning an AR is simple. Locate the needed action request either through the Manage AR screen or from within an incident. Click the **Re-Assign** button. A screen similar to the one below displays in a separate window.

1. Complete at least one search criteria field. Click the **Search** button.



2. If the employee you need does not display in the Matching Records field, click the **Clear** button. Repeat step 1 with new data.

3. Highlight the employee you want to make the new owner of the AR and click the **Select** button.



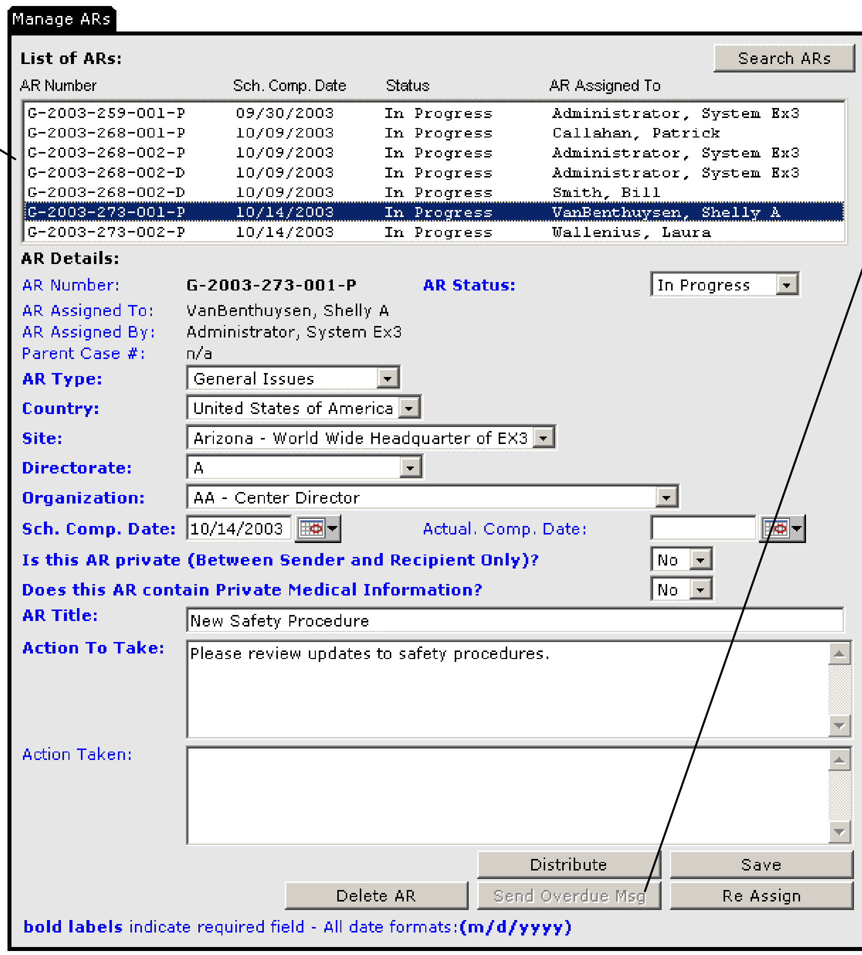
4. A verification pop-up displays. Click **OK** if you want to reassign this AR.

5. A pop-up displays stating the AR has been reassigned. Clic k **OK**. You'll return to the Manage AR screen.

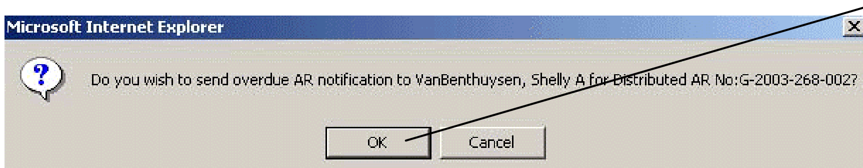
Notes

Send Overdue Msg button
Once an AR has been assigned a scheduled completion date, you may remind AR owners when an AR you assigned them is overdue. Simply locate the AR you need, either through the Manage AR screen or from within an incident record. Click on the **Send Overdue Msg** button at the bottom of the screen. If the **Send Overdue Msg** button is grayed out, then the AR is not yet overdue.

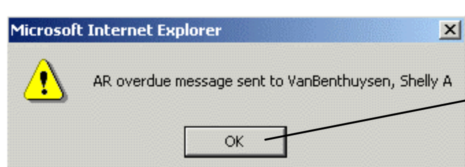
1. Locate the overdue AR.



2. Click the **Send Overdue Msg** button.



3. A pop-up displays asking if you want to send an overdue message. Click the **OK** button.



4. A pop-up displays stating the message was sent. Click the **OK** button.

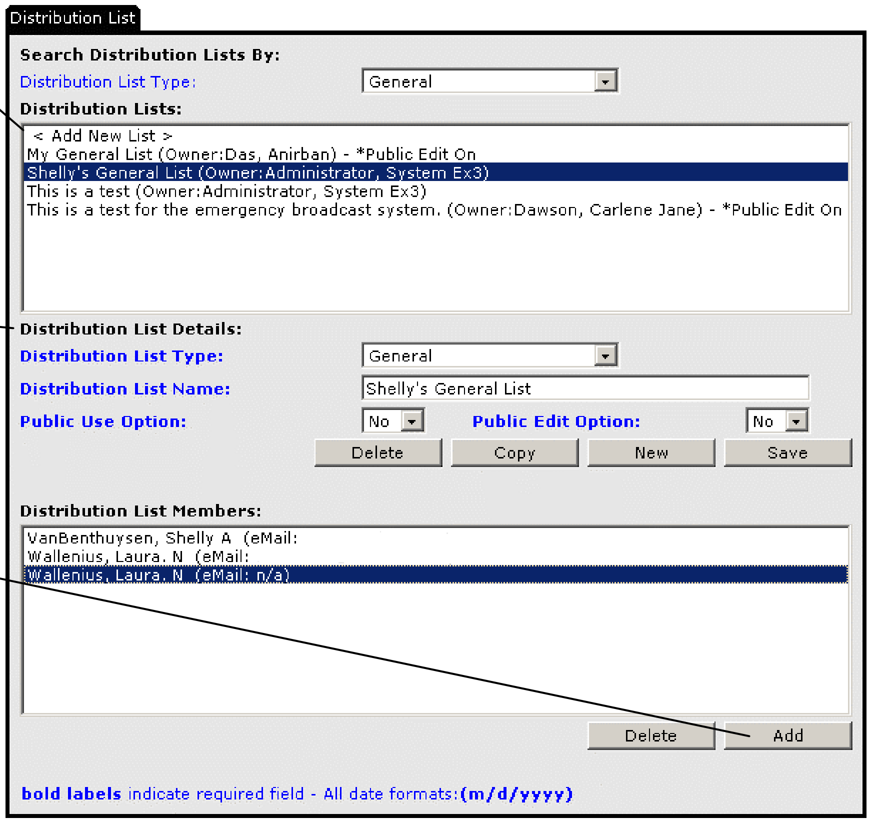
Creating Distribution Lists

The Distribution feature allows you to create distribution lists for use when sending out Action Requests. This is a helpful feature if you send out eMails to a set group of people when incidents occur. These lists can be made public, so other system users can use them or private depending on your public use selections.

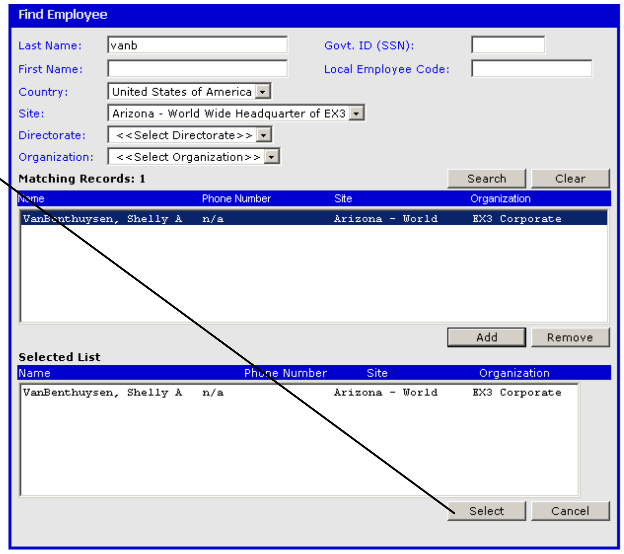
1. Highlight **<Add New List>** or click the **New**button.

2. Complete all of the Distribution List Details fields and click **Save**.

3. Highlight your newly created distribution list and click the **Add** button



4. A find employee screen displays. Locate all of the employees you need for your list. Click the **Select** button to import those names into your distribution list.



Running Action Request Reports

Once action request data has been entered into the system, it can be used to create various reports. The process for running reports is essentially the same for all reports. First select the report you want to run from the Action Request main menu. A Find Report tab will display. Fill in all the information you want to use as your report criteria and click the **Run Report** button.

All reports display in a separate viewer window. If this is the first time you have used the report function on this computer, see RUNNING INJURY/ILLNESS REPORTS beginning on page 66 for more information.

Notes

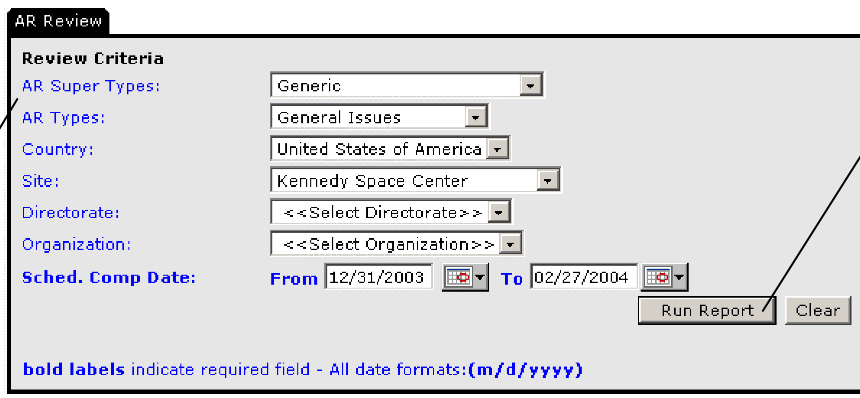
Action Request Reports

On the following pages you will find explanations and examples of the various reports available in the Action Request module.

Action Request Review Report

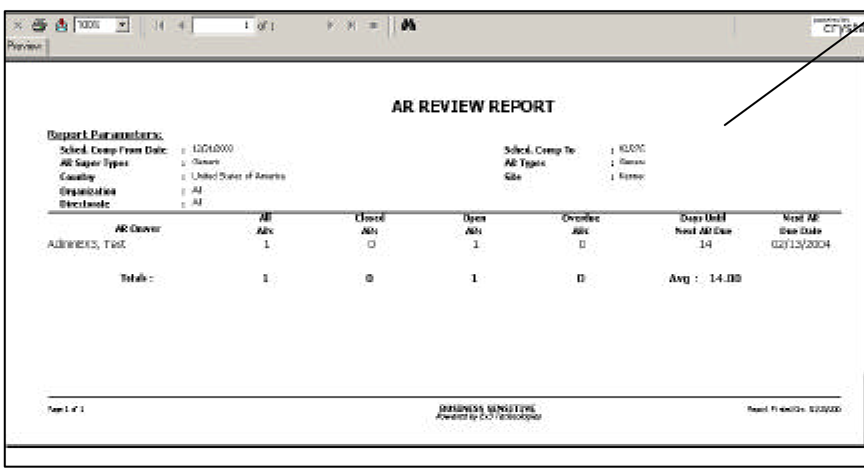
The review report shows action requests broken down by owner for a specified period. This report also shows whether the ARs are open or closed, whether they are overdue and by how many days. You may sort ARs by super type, AR type, country, site and organization.

1. Complete as many search criteria fields as you need. Remember to complete all required fields shown in bold blue.



2. Click the **Run Report** button.

3. This report displays.

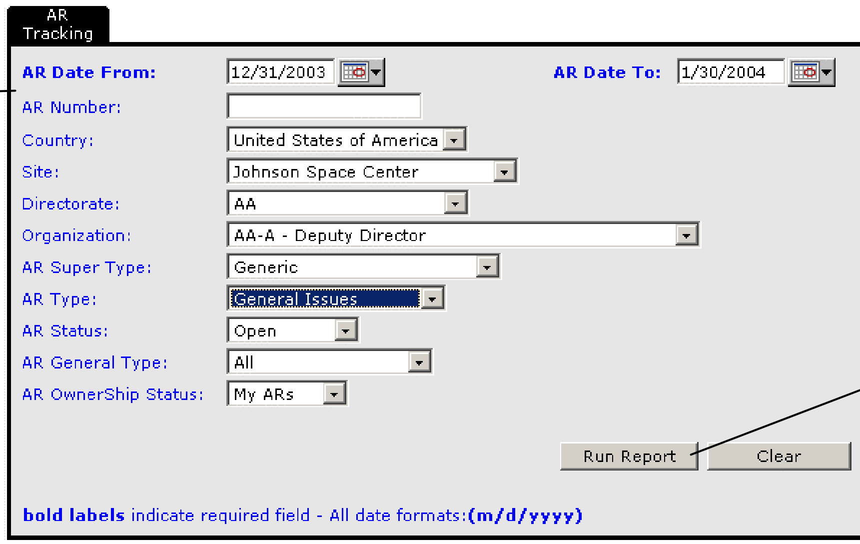


Notes

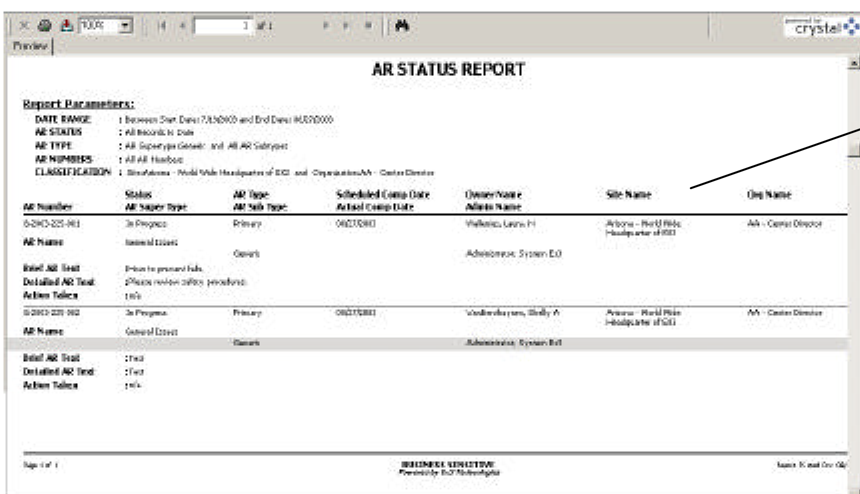
Tracking Report

The Tracking report, also called the Status Report, gives AR details for all ARs that meet your specified search criteria.

1. Complete as many search criteria fields as you need. Remember to complete all required fields shown in bold blue.



2. Click the Run Report button.



3. This report displays.

Notes

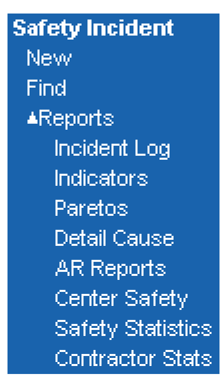
Exploring the Safety Incident Module

- **Finding an Incident Record**
- **Creating a New Incident**
- **Completing an Incident Record**
- **Running Safety Reports**

The Safety Incident Module tracks data related to various safety incident types. You can use this module to associate safety incidents with people, work environments, equipment and other investigation data to support your root cause analysis. The dynamic reporting capabilities provide instantaneous graphics, reports, indicators, and paretos to support your Safety Team's efforts for an "Injury-Free" workplace.

The Safety Incident Module helps you "close the door" on safety incidents before they have a chance to become a runaway problem. It also gives you the ability, through effective reporting and analysis, to support proactive responses to safety concerns.

The following options display on the Safety Incident menu:



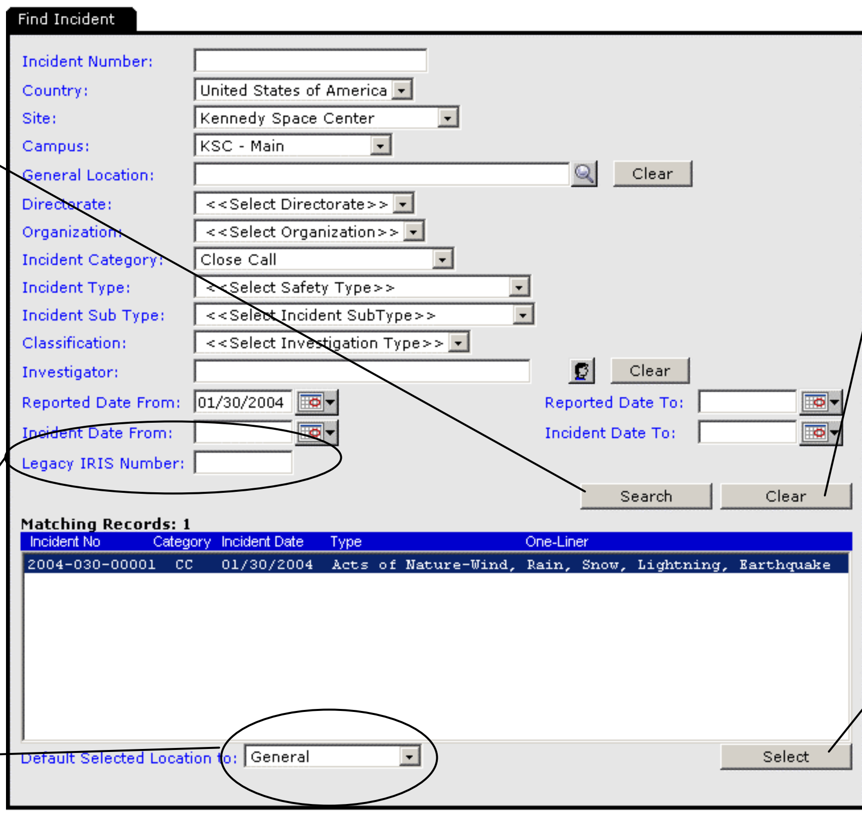
Finding an Incident Record

Once an incident record has been created, you may locate it using the Find option on the Safety Incident menu. Click **Find** on the Safety menu and a Find Incident screen displays. When you have located the correct incident, you may open it by clicking the **Select** button on the bottom of the screen.

1. Complete at least one search criteria field. Click the **Search** button. A list of possible matches will display in the Matching Records field.

You may search for legacy incidents using the Legacy IRIS Number field.

Use this field to select the tab you wish the record have open first.



2. If the appropriate incident is not listed, click the **Clear** button. Repeat step 1 using new data.

3. Highlight the appropriate incident from the list and click the **Select** button. The selected incident opens.

Notes

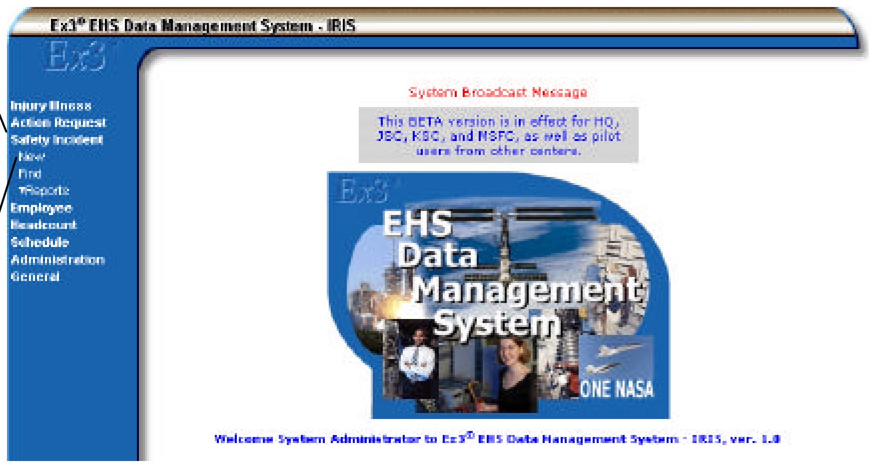
Creating a New Incident Record

When a safety incident occurs, it is important to gather details about the incident as quickly as possible, so you can figure out what happened and prevent it from escalating or occurring again. To do this you must create a new safety incident record

The diagram below outlines how to create a new safety incident record.

1. Click **Safety** on the main menu to open the drop-down menu.

2. Click **New** under the Safety menu. The General tab will display.

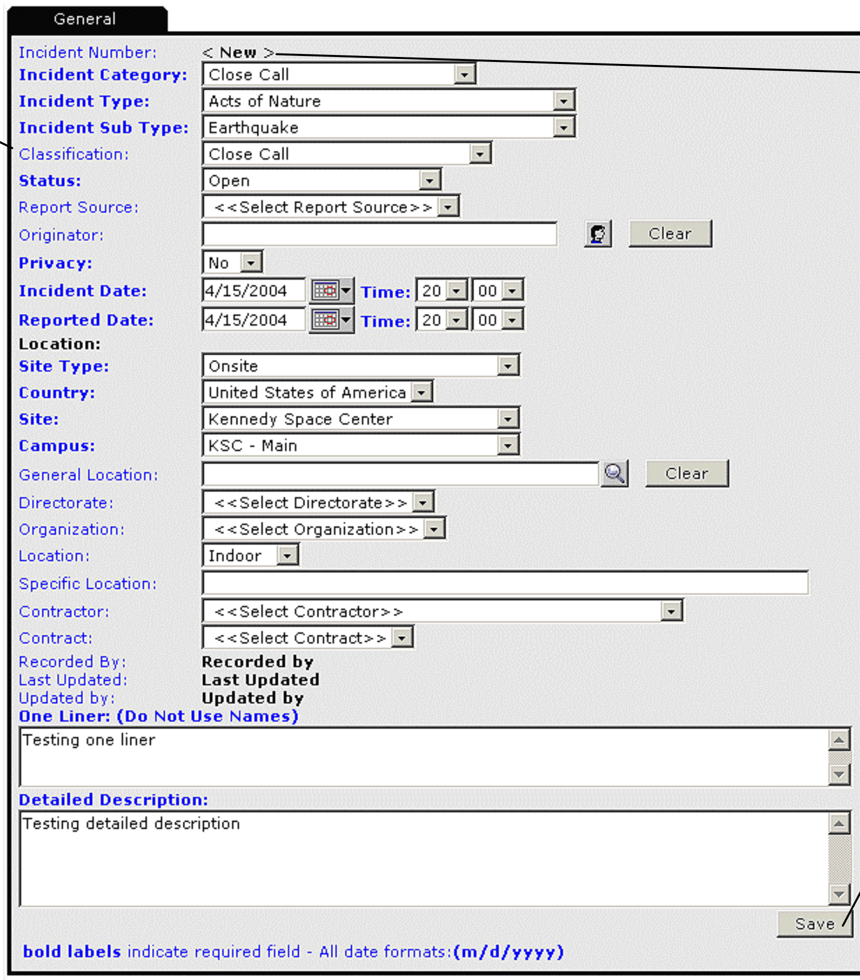


Notes

Creating a New Incident, cont'd.

This General screen records all of the basic incident information including a brief description of the incident.

1. Complete as many fields as you can. Fields shown in bold blue are required.



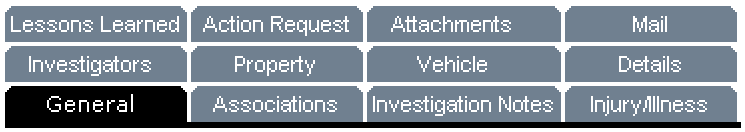
An incident number will be assigned when the record is saved.

2. Click the **Save** button. The screen blinks out and redisplays with tabs visible for other screens.

Notes

Completing an Incident Record

Once you have located or created an incident record, the system displays the Safety Incident tabs. The number and names of the tabs that you have access to depends on your role in the system. All the tabs are outlined in this section.



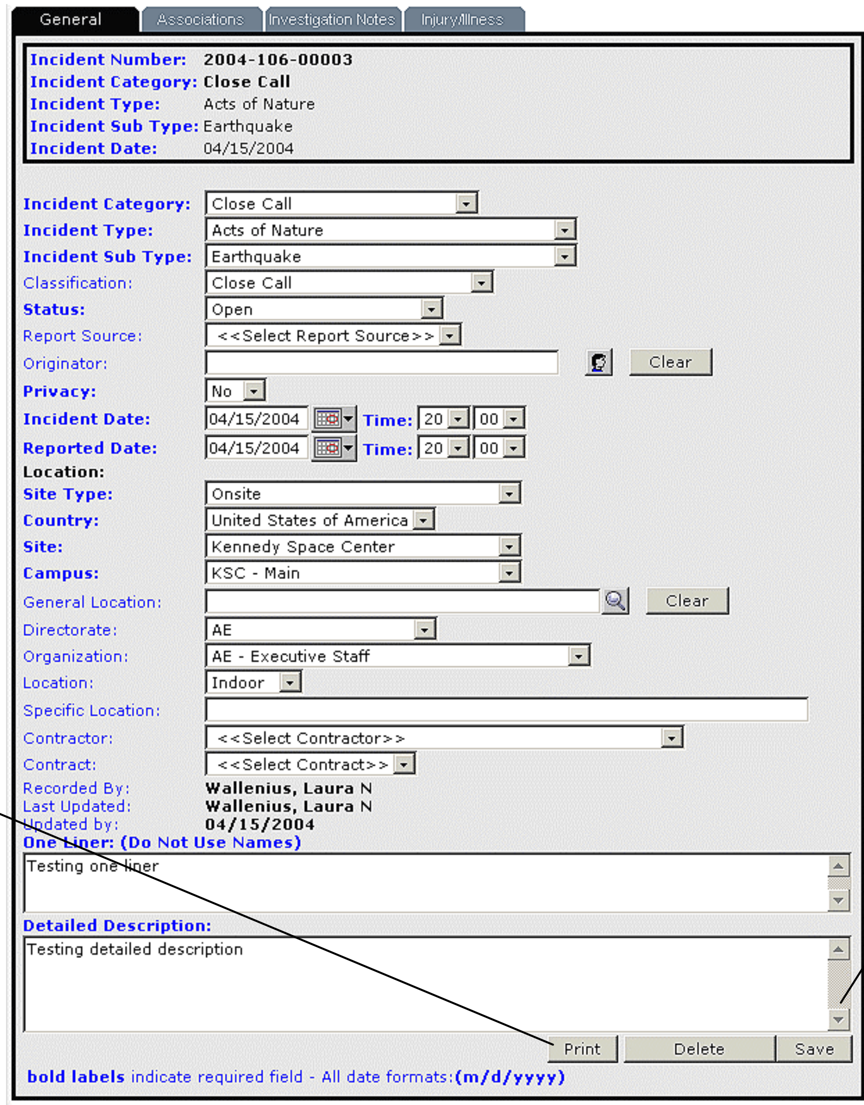
The tabs are laid out in a way that allows easy navigation. To move from one tab to another, you simply click the tab. You may not need to fill out every available tab for every incident. However, it is very important to capture as much information as you can on all the tabs that do apply. Remember, these records are only as good as the data they contain. So, a complete record produces better reports and accurate statistics.

Once a tab is open, you may move from one field to another by pressing the **Tab** key on your keyboard or by clicking in each field with the mouse. All the required fields are shown in bold blue. Remember to click the **Save** button, if it is available, before switching to another tab or module to avoid losing data.

Notes

General Tab

After the initial General screen is saved, several tabs display. The General tab is the same as the initial General screen displayed when you click **New** on the Safety Module menu, except that it displays an incident number. You may view, edit or print this screen.



You may print out this screen using the **Print** button.

Remember to click **Save** if you make changes to this screen.

Notes

Associations Tab – Equipment Sub Tab

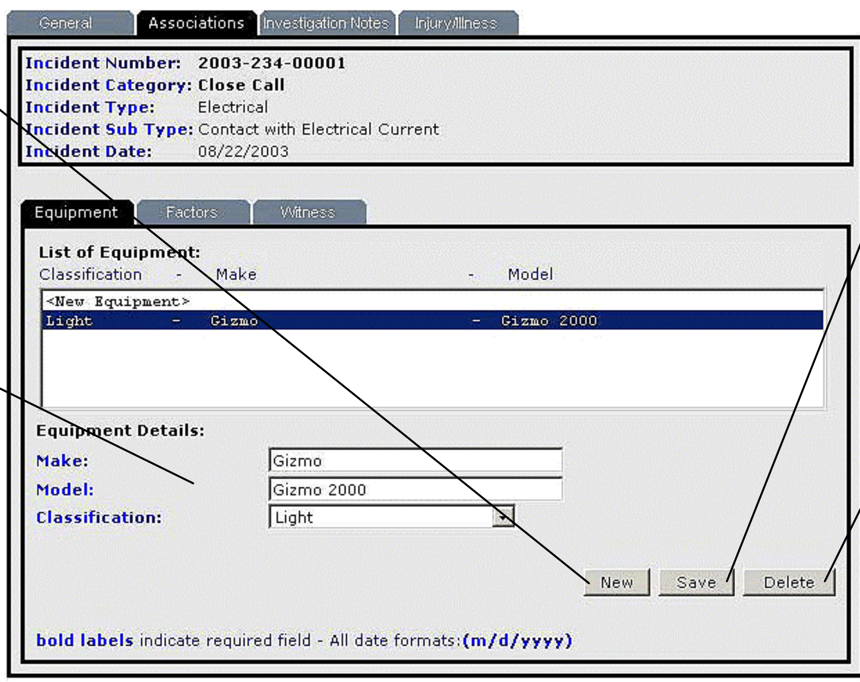
The Equipment sub-tab allows you to collect details about equipment that contributed to the safety incident. You specify the make and model of the equipment. Once saved, you may view a piece of equipment's details by highlighting it on the List of Equipment.

The Equipment sub-tab records all equipment involved in an incident, regardless of damage. Equipment that has incurred damage is also recorded on the Property tab.

For more information about property damage see the PROPERTY TAB beginning on page 111.

1. Click the **New** Button or highlight **<New Equipment>**.

2. Complete <u>all</u> of the Equipment Details fields.



3. Click **Save** . The associated equipment will display in the List of Equipment field.

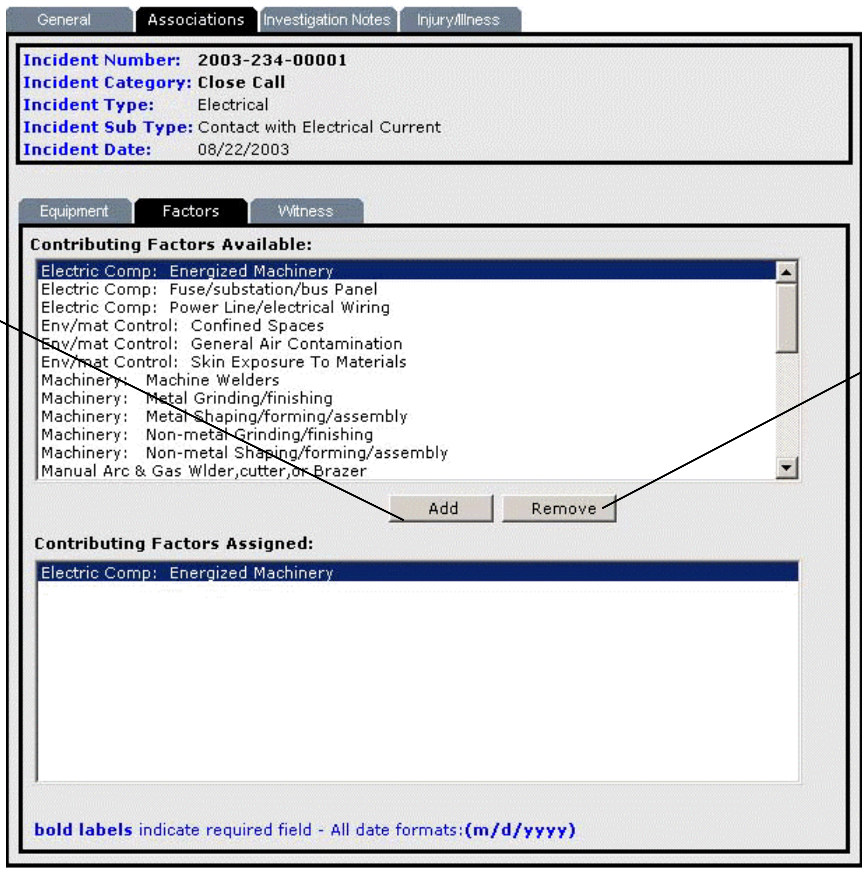
Use the **Delete** button to remove equipment from the List of Equipment.

Notes

Associations Tab – Factors

The Factors sub-tab allows you to assign contributing factors for an incident. Possible contributing factors have been predefined and display in the Contributing Factors Available field. Since more than one factor may be involved in an incident, you may assign multiple factors using the "Contributing Factors Available" list.

1. Highlight a factor on the Contributing Factors Available list and click the **Add** button.



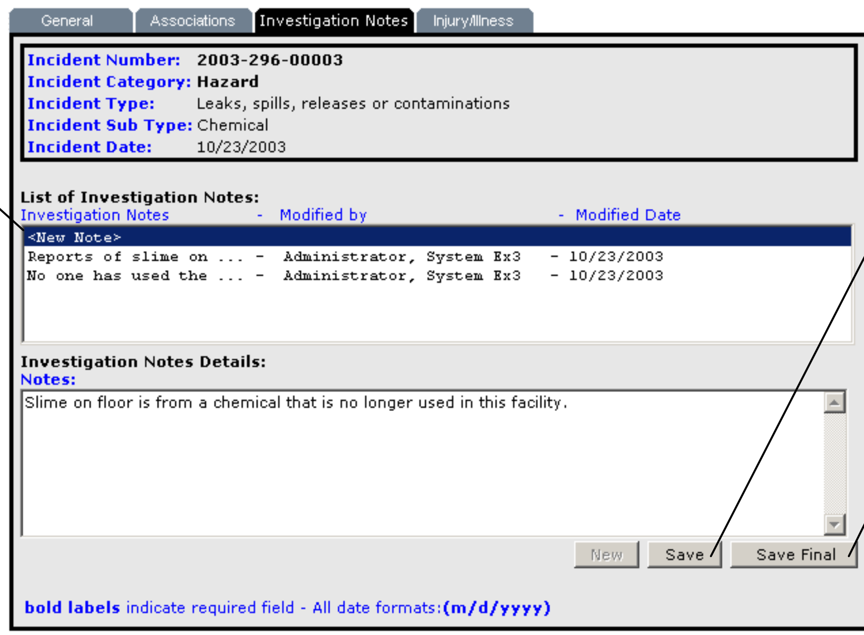
2. If you assigned a factor in error or it is no longer necessary, simply highlight it on the Contributing Factors Assigned list and click the **Remove** button.

Notes

Investigation Notes Tab

The Investigation Notes tab allows investigators to create a log of investigation notes. Once a note has been added it may not be deleted. Notes may be edited after they have been saved but only by the person who created the note.

1. Click the **New** button or highlight **<New Note>**.



2. Type your note and click **Save**.

3. Use the **Save Final** button when an investigation note is complete. The note cannot be edited once **Save Final** is used.

Notes

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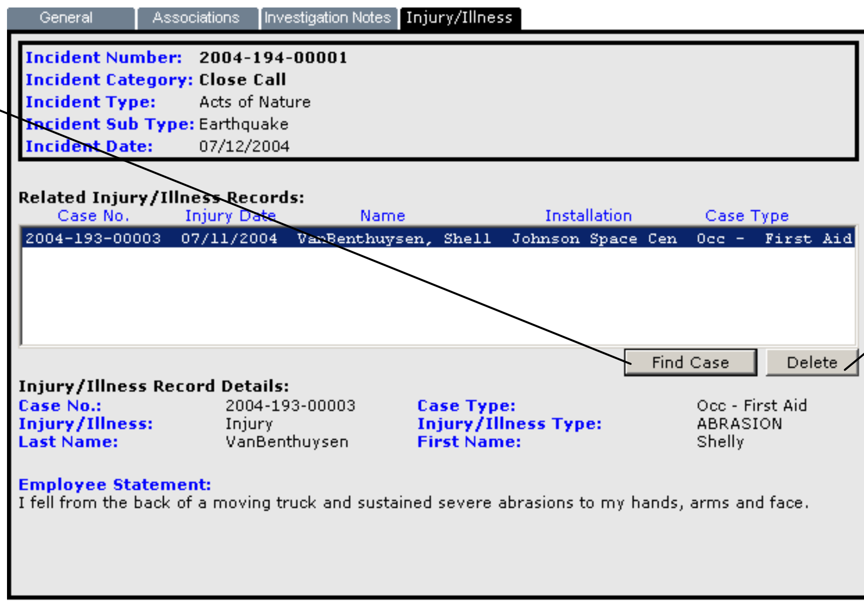
Injury/Illness Tab

The Injury/Illness tab allows you to associate injury/illness records with the safety incident. For example, a leaking chemical container might result in an employee falling. Using this tab you may attach that employee's injury record to the safety incident, in order to create a more complete record.

1. Click the **Find Case** button. A Find Case screen displays.

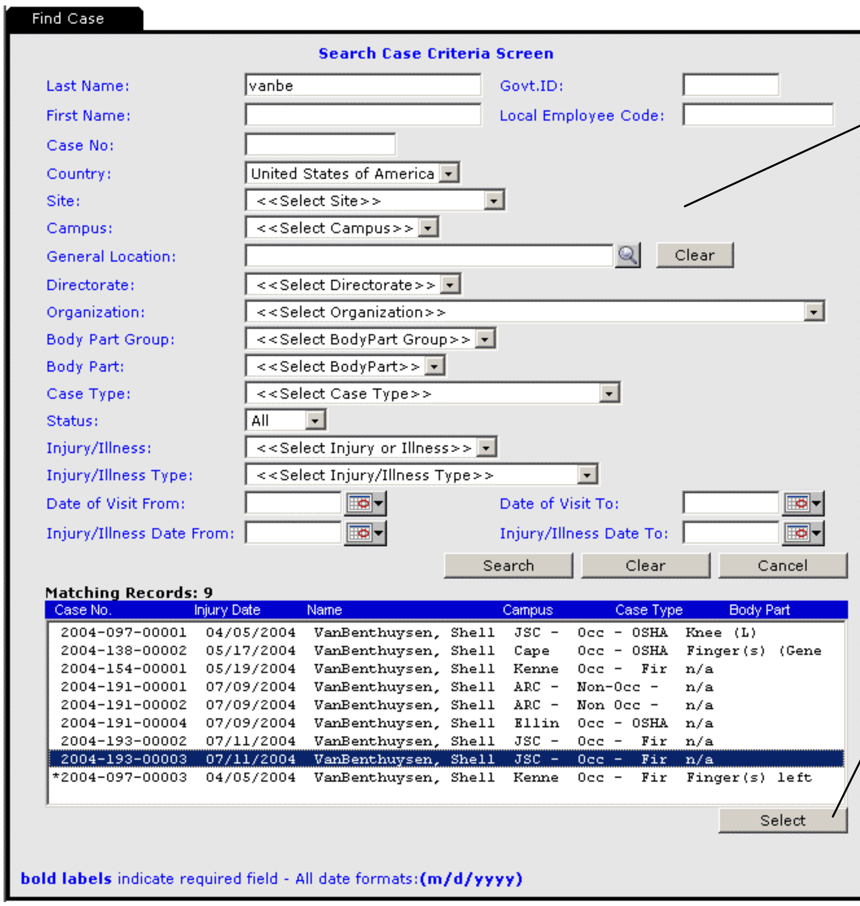


Use the **Delete** button to remove any unwanted records.

Notes

Injury/Illness Tab, cont'd.

Find Case button
When you click the **Find Case** button a Find Case screen displays. Use this screen to locate the appropriate injury/illness record to attach to the incident. Once the record is selected it will display in the Related Injury/Illness Record field.



2. Complete at lease one search criteria field and click the **Search** button.

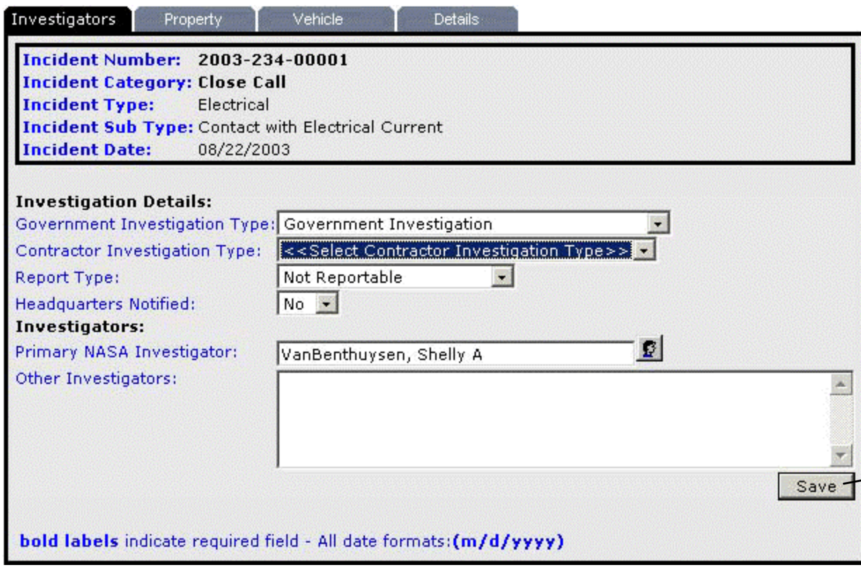
3. Highlight the appropriate record and click the **Select** button.

Notes

Investigators Tab

The Investigators tab allows you to record investigator information such as investigation type and report type. You may also assign a primary investigator as well as list all other investigators involved with the incident investigation.

1. Complete as many data entry fields as you can.

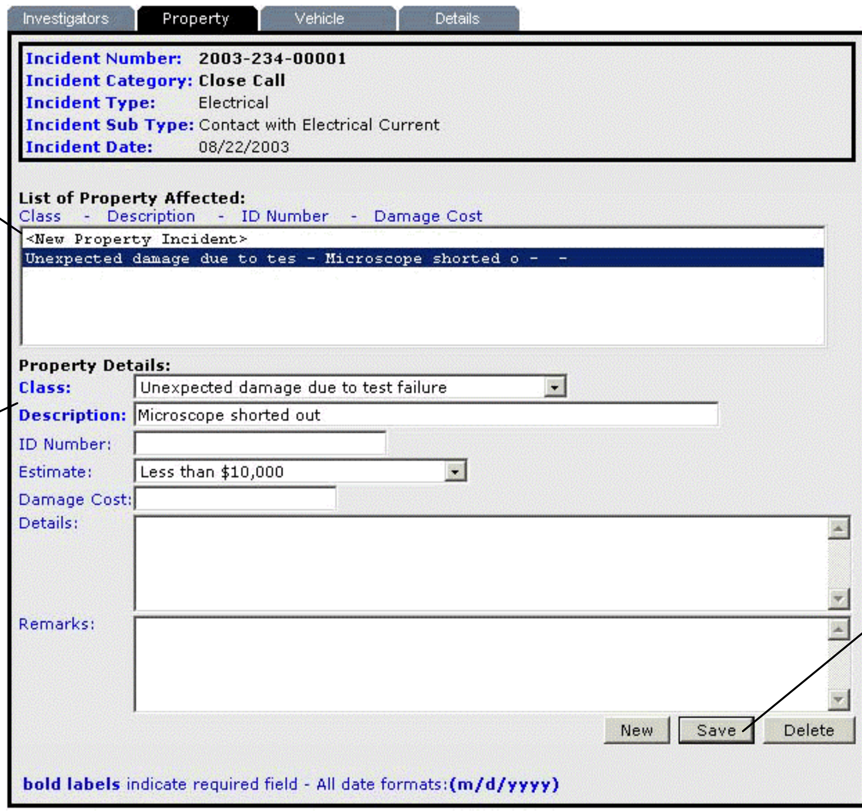


2. Click the **Save** button.

Notes

Property Tab

Often a safety incident will incur damage to property. The Property tab allows you to list all property affected by the incident as well as any related costs.



1. Click the **New** button or highlight **<New Property Incident>**.

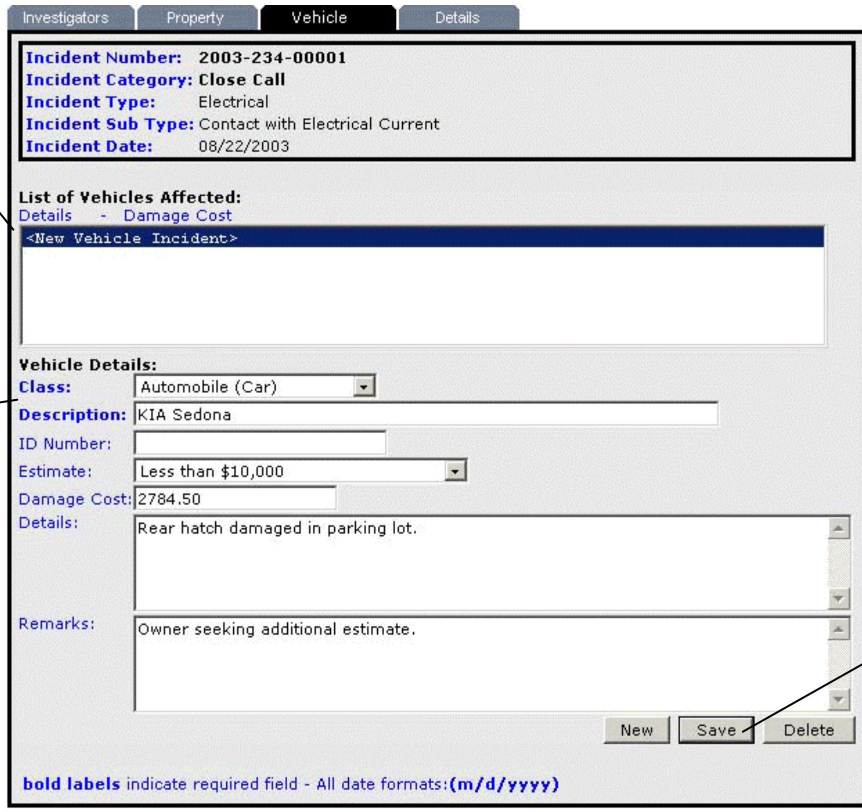
2. Complete as many data entry fields as you can remember to complete all required fields shown in bold blue.

3. Click the **Save** button. The property will display in the List of Property Affected field.

Notes

Vehicle Tab

In some cases, a safety incident will cause damage to a vehicle. The Vehicle tab allows you to list any vehicles affected by the incident as well as any related costs.



1. Click the **New** button or highlight **<New Vehicle Incident>**.

2. Complete as many fields as you can remembering to complete all required fields shown in bold blue.

3. Click the **Save** button. The vehicle will display in the List of Vehicles Affected field.

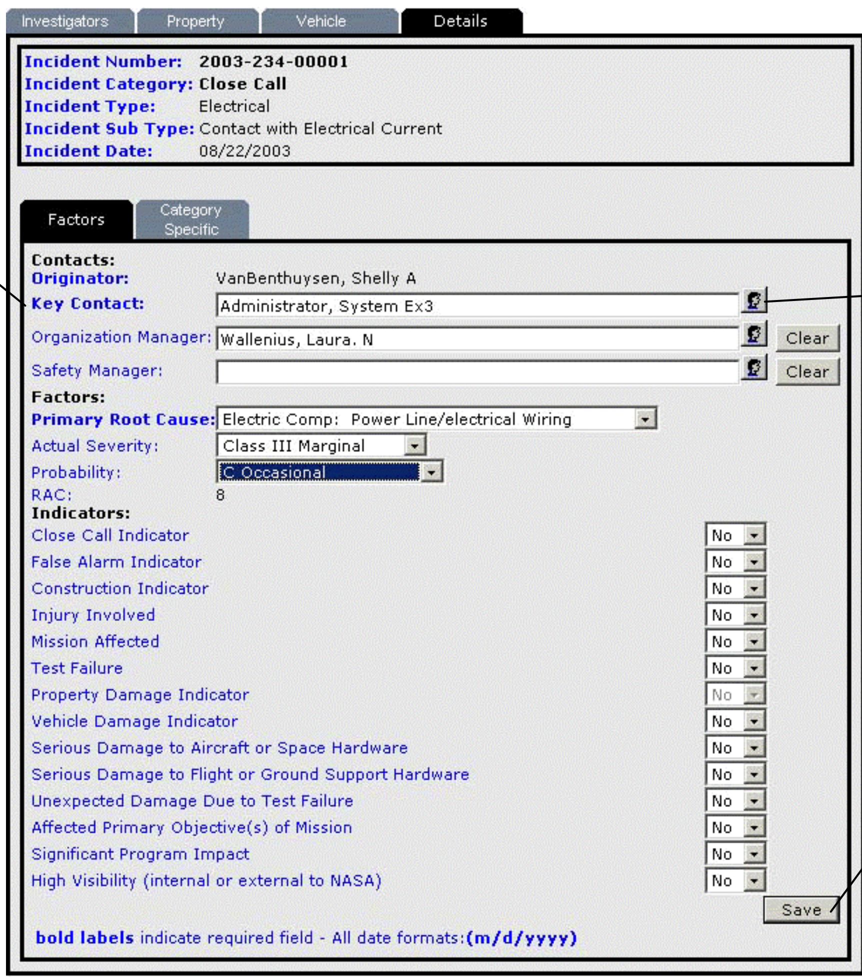
Notes

Details Tab – Factors

The Details tab contains two sub-tabs that collect a variety of information. The Factors sub-tab records important contacts for the incident, the incident's severity and probability of recurrence as well as categorizations for the incident such as close call, false alarm, and injury.

One or more Indicator drop-downs may be grayed out upon opening this tab. This occurs if, for example, property damage is recorded using the Property tab. When the Details tab is opened the Property Damage Indicator drop-down is defaulted to "Yes" and cannot be changed unless the property damage record is deleted. This also applies to the Vehicle Damage Indicator and the Injury Involved drop-downs.

1. Complete as many data fields as you can.



Use the look up buttons to locate contacts.

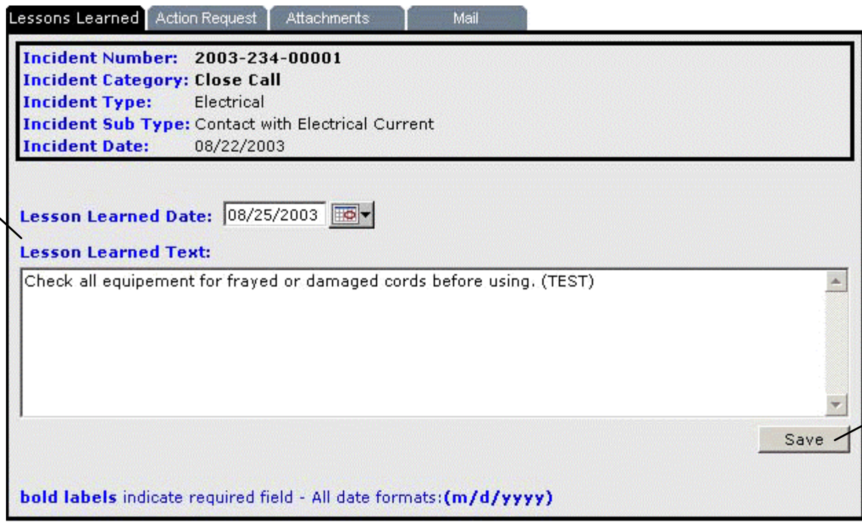
2. Click the **Save** button.

Notes

Lessons Learned Tab

The Lessons Learned tab records the final outcome of the incident investigation. You may add to the lesson learned text as often as you need.

1. Complete <u>all</u> of the data fields.



2. Click the **Save** button.

Notes

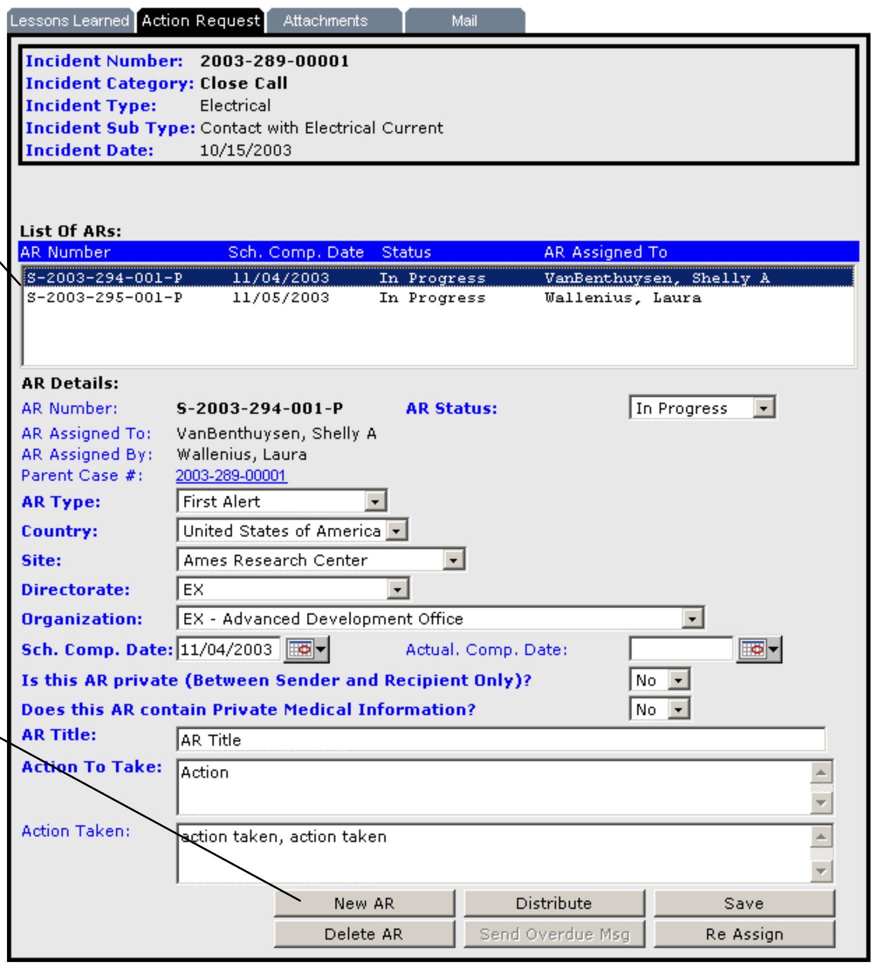
Action Request Tab

When managing an incident, you may need to delegate some incident-related tasks to other employees or to provide specific information so you can complete your tasks. You can use the Action Request tab to make those requests.

For more information on creating action requests see Creating an Incident Specific Action Request beginning on page 81.

Keep track of the progress of all action requests for this incident.

New AR allows you to create and assign a new Action Request.



Notes

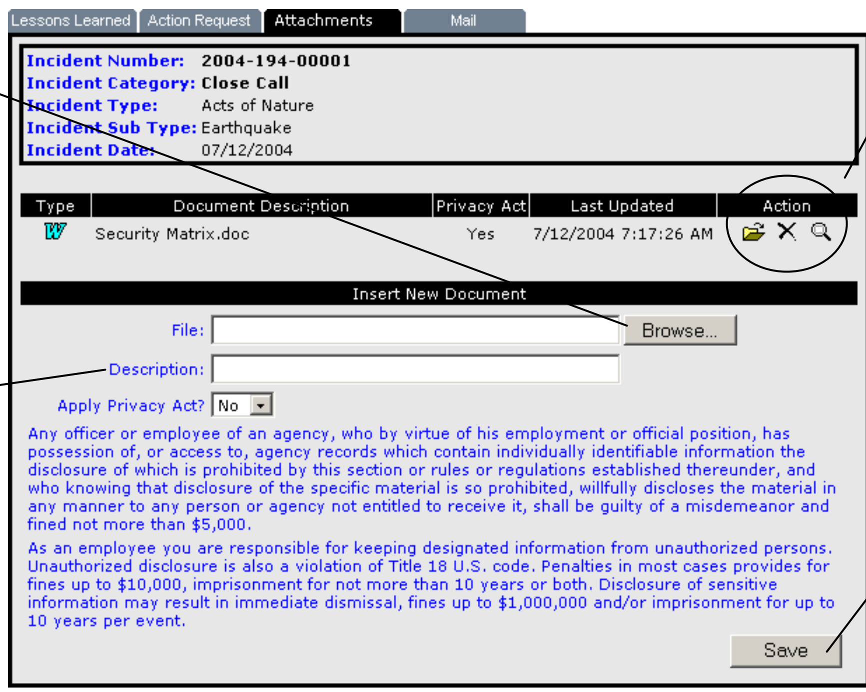
Attachments Tab

The Attachments Tab allows you to attach electronic or scanned documents directly to the record. For example, if you have an invoice, photo, audio file of a doctor's comments, or even video documentation, you can attach copies of them to this file for future reference. Thus eliminating files, overflowing with backup paper documentation.

If the document you want to attach contains sensitive information select "Yes" in the "Apply Privacy Act?" field before you save the document. This limits access to this document to medical personnel.

1. Click the **Browse** button. Select a file using the "Choose File" window that displays.

2. The system defaults to the file's name as the description. You may use any name you would like.



Use the action icons to manipulate the attached document.

2. Click the **Save** button. The file displays in the document list above.

Notes

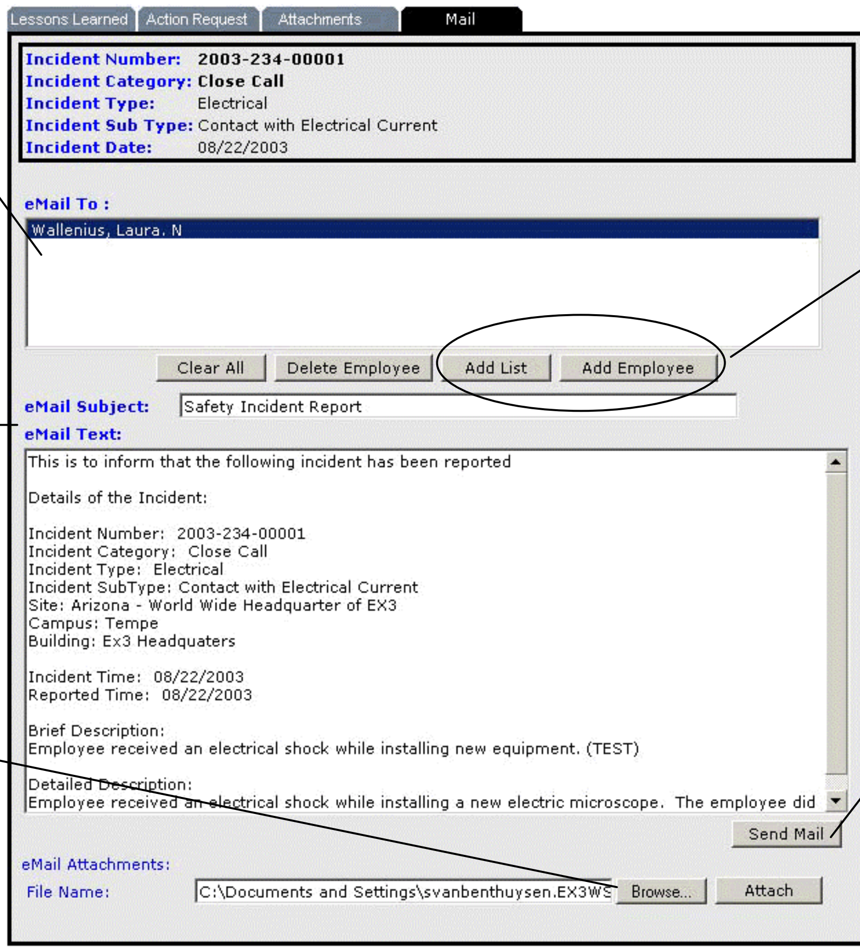
Mail Tab

The Mail tab allows you to notify employees through eMail that an incident has occurred. The notification eMail contains the incident number as well as an incident date and description. The sender of the eMail receives a copy of the eMail.

1. Select people to notify using either the **Add List** button or the **Add Employee** button.

2. Modify eMail subject and text if needed.

3. Add attachments using the **Browse** and **Attach** buttons.



For more information on using these buttons see ASSIGNING EMPLOYEES TO EMAIL beginning on page 119.

4. Click the **Send Mail** button to send notification.

Notes

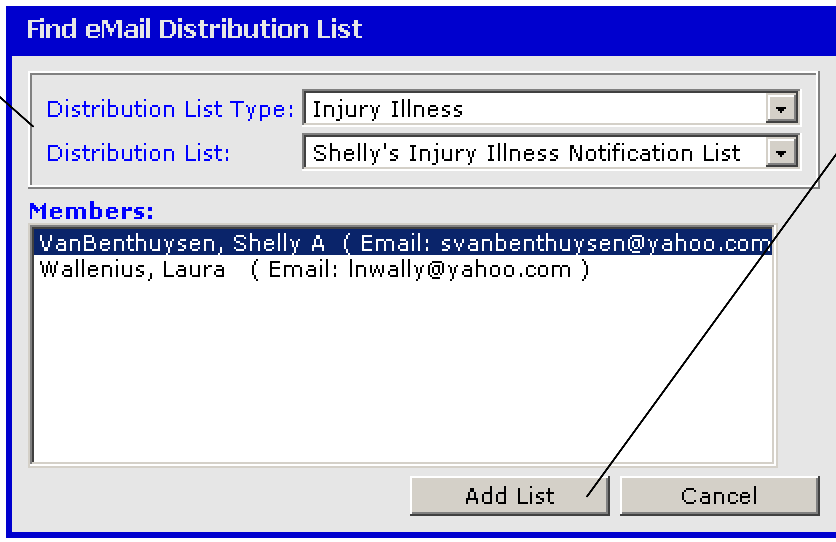
Assigning Employees to eMail

The “eMail To” field on the eMail screen can be filled with one or more employees. Use the buttons to the bottom right of this field to add or delete as many employees as necessary.

Add from List Button
Use this button to assign a set list of employees. The screen below displays in a separate pop-up box when you click the **Add List** button. If you can’t find an appropriate list, you may create one using the Distribution List function within the Action Request module.

For more information on creating distribution lists see CREATING DISTRIBUTION LISTS beginning page 95.

1. Select the distribution type and list using the drop-down boxes.

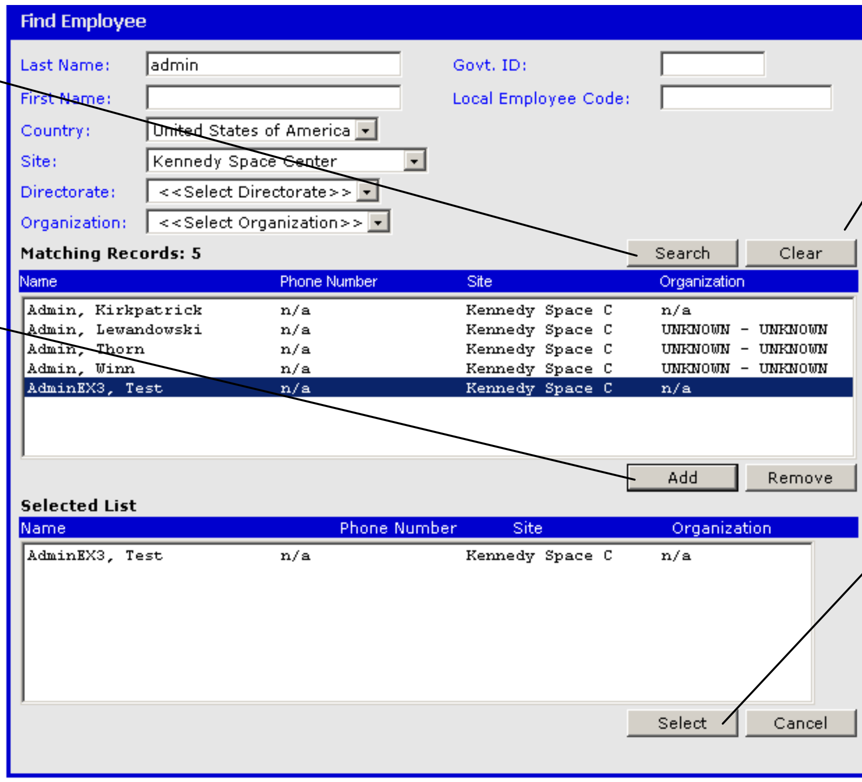


1. Click the **Add List** button to import the Members list to the eMail To field.

Notes

Assigning Employees to eMail, cont'd.

Add Employee Button
Use this button if you require only one employee or if you need to select employees that are not part of a distribution list. The Find Employee screen displays in a separate pop-up box when you click the **Add Employee** button.



1. Complete at least one search criteria field. Then click the **Search** button.

2. All employees that match your search display in the Matching Records field. Highlight the correct employee and click the **Add** button.

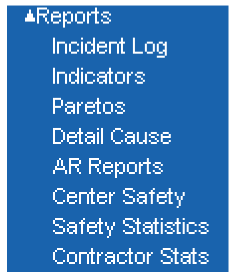
3. Click the **Clear** button to clear the search criteria fields. Repeat steps 1 and 2 until all employees needed have been selected.

4. When the Selected List field contains all needed employees click the **Select** button. Your selections will be imported to the eMail To field.

Notes

Running Safety Reports

Once safety incident data has been entered into the system, it can be used to create various reports. The process for running reports is essentially the same for all reports. First select the report you want to run from the Safety main menu. A Find Report tab displays. Fill in all the information you want to use as your report criteria and click the **Run Report** button.



All reports display in a separate viewer window. If this is the first time you have used the report function on this computer, see RUNNING INJURY/ILLNESS REPORTS beginning on page 66 for more information.

Notes

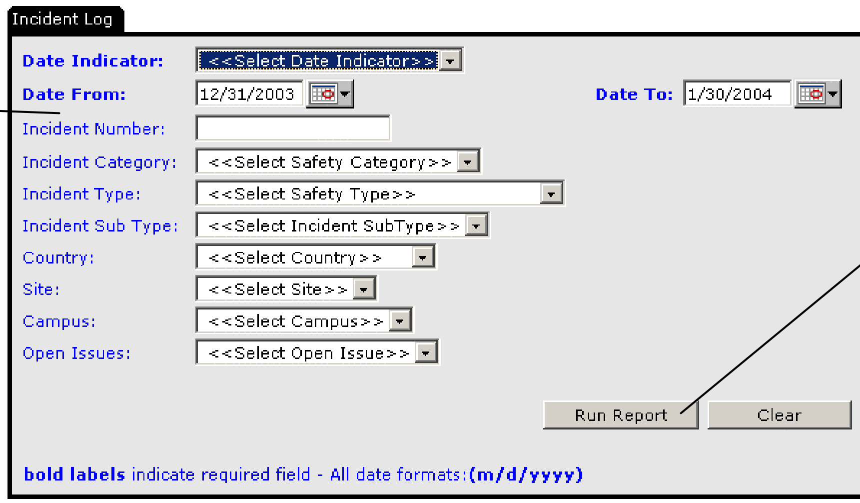
Safety Reports

On the following pages you will find explanations and examples of the various reports available in the Injury/Illness module.

Incident Log

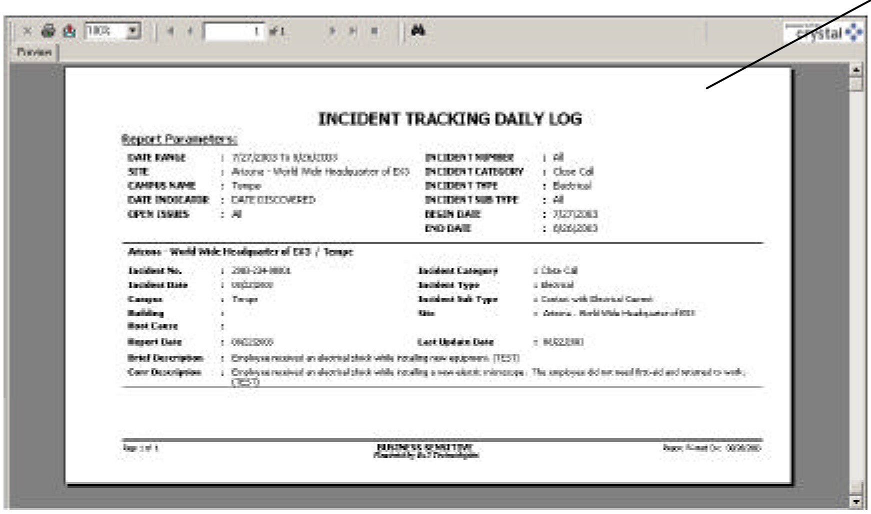
This report gives a summary of each incident record that meets a set of given search criteria.

1. Complete as many fields as you want. Remember fields shown in bold blue are required.



2. Click the **Run Report** button.

3. This report will display in separate viewing window.



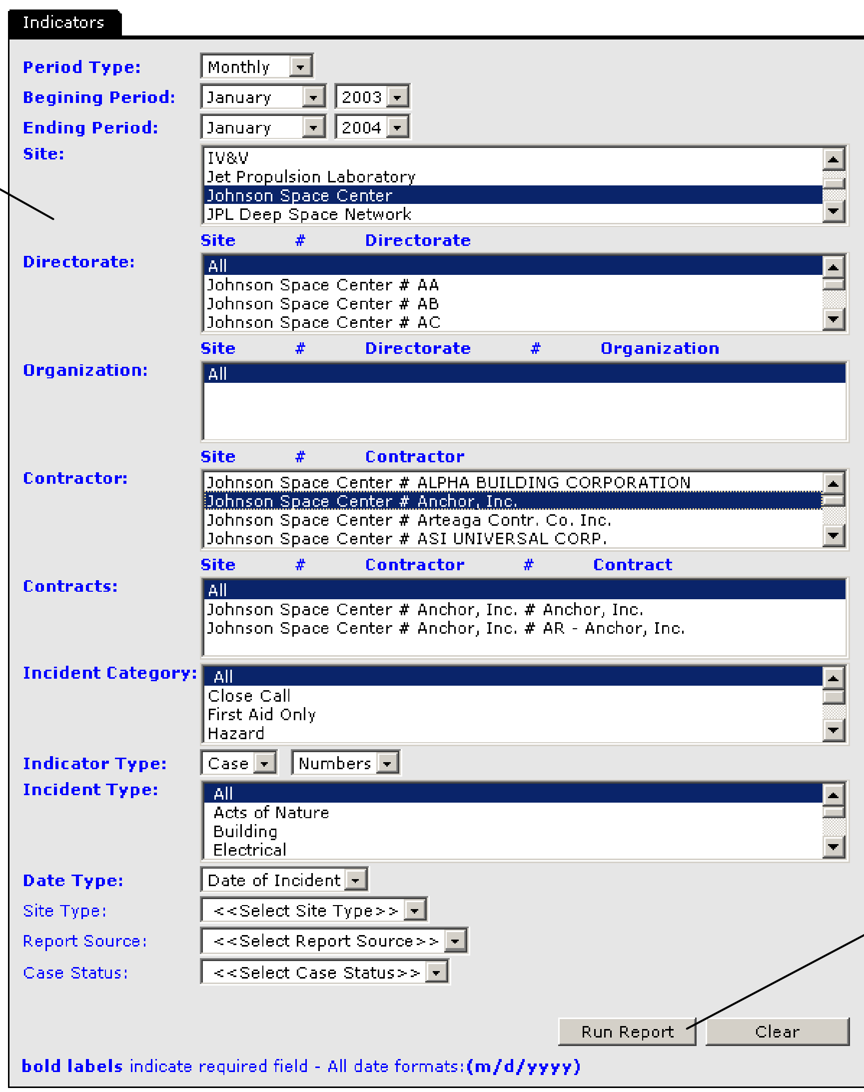
Notes

Indicators

This report is a bar graph plotting the information in sequential or alphabetic order. This report is good at showing trends of an item over time. While a Pareto report is more flexible in allowing you to specify exact specification for a chart, the indicators chart produces many widely used reports, such as, “What is the incident rate for Close Calls in Arizona for the first quarter of 2001?”

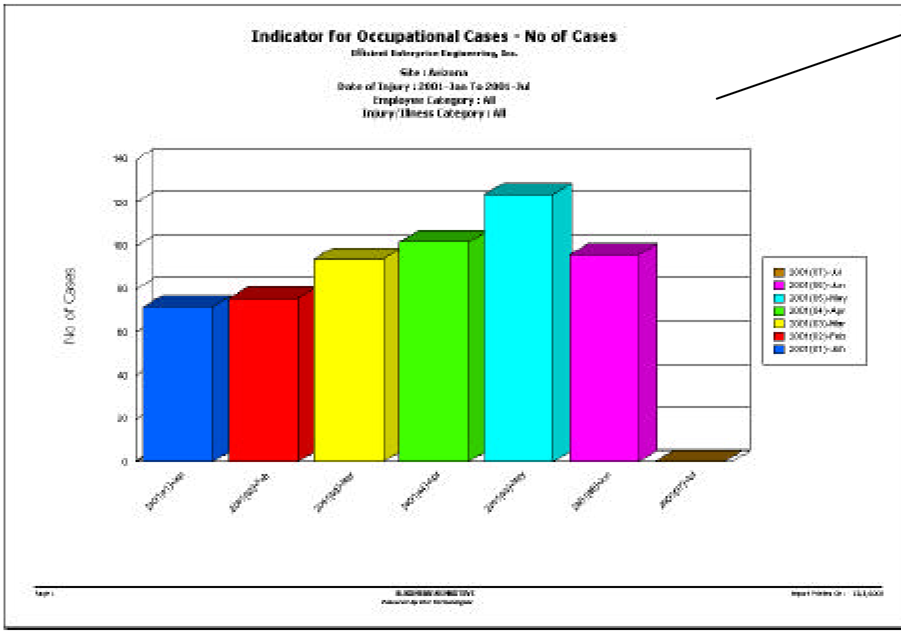
The find report screen allows for choosing multiple items in certain drop-down lists. Choosing multiple items produces a stacked bar chart, with different colors assigned to each of the selected items.

1. Complete as many fields as you want. Remember fields shown in bold blue are required.



2. Click the **Run Report** button.

3. This report will display in separate viewing window.



Indicator for Occupational Cases - No of Cases

Efficient Enterprise Engineering, Inc.

Site : Arizona
Date of Injury : 2001-Jan To 2001-Jul
Employee Category : All
Injury/Illness Category : All

	Total for Period	2001(01)-Jan	2001(02)-Feb	2001(03)-Mar	2001(04)-Apr	2001(05)-May	2001(06)-Jun	2001(07)-Jul
Total For Company	1,698	223	274	257	298	348	296	2
Total for selected Sites	564	72	76	94	102	124	96	0
Arizona	564	72	76	94	102	124	96	0

BUSINESS SENSITIVE

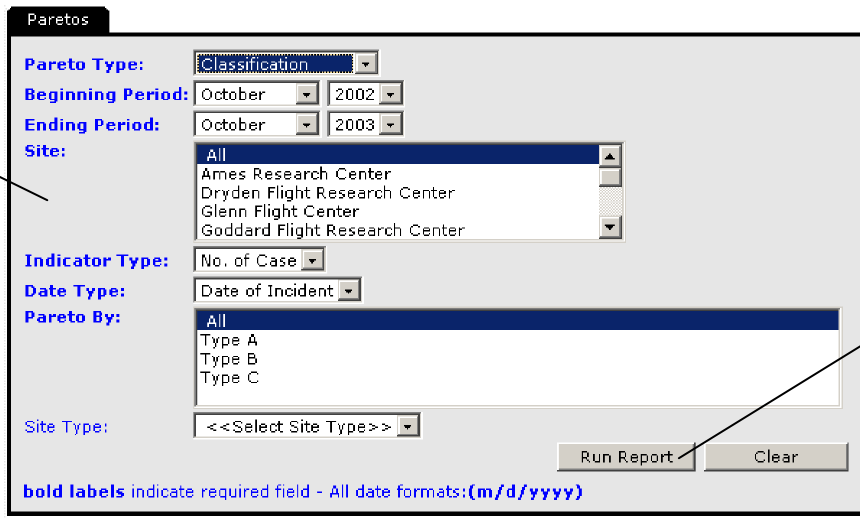
Notes

Paretos

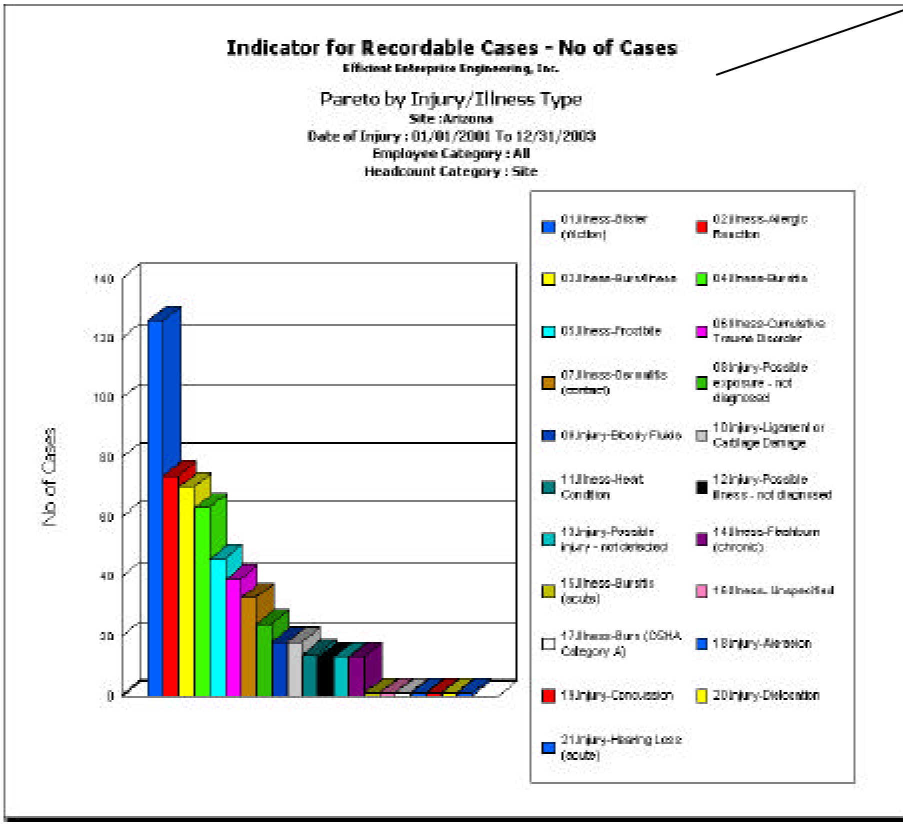
This report is a bar chart that displays the most frequently occurring or largest item at the left of the chart, with smaller or less frequent items displaying in descending order to the right. This visual representation allows the user to see problem areas quickly.

You can build a pareto report from just about any of the drop-down lists within the application. This allows you to create reports that can answer specific questions such as "What types of accidents are happening to people in the ABC organization?" Also, the multi-select lists (for example, Site and Pareto By) allow you to choose one, several, or all the values in the drop-down list. Use the standard CTRL + Click or Shift + Click combinations to select a collection or a list of values within a list box.

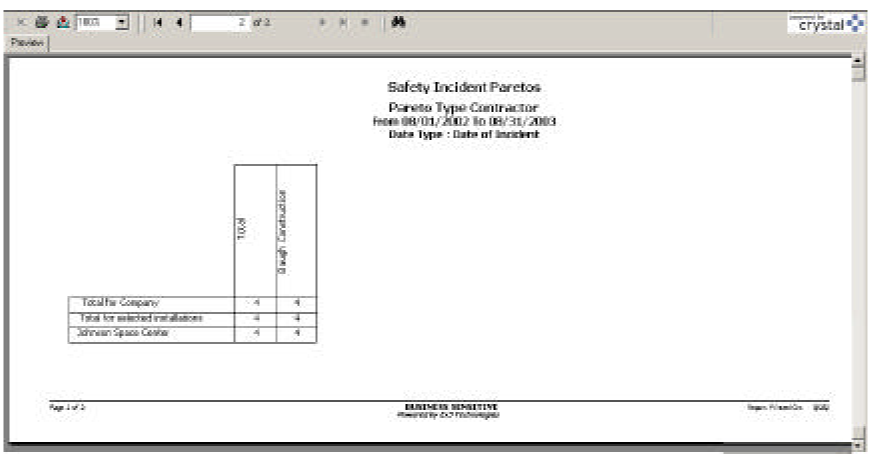
1. Complete as many fields as you want. Remember fields shown in bold blue are required.



2. Click the **Run Report** button.



3. This report will display in separate viewing window.



Notes

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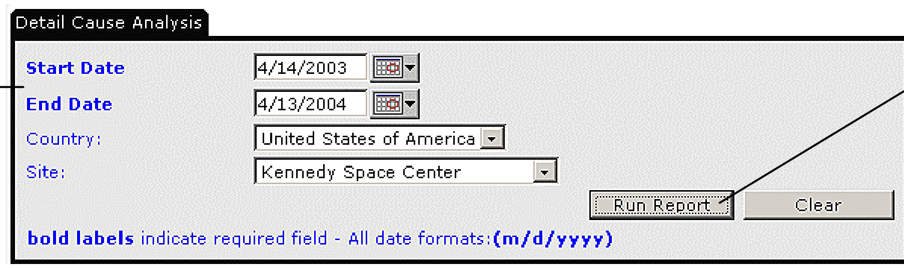
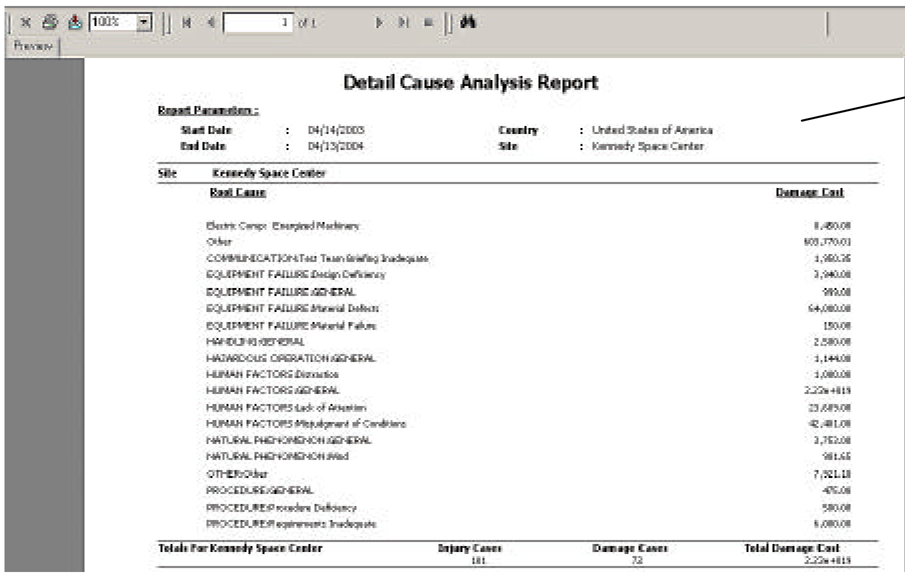
Detail Cause Analysis

This report displays all root causes recorded for a specific site along with the damage cost for each. This report also displays the total number of injury/illness cases, damage cases and total damage dollars for the specified site.

1. Complete as many fields as you want. Remember fields shown in bold blue are required.



2. Click the **Run Report** button.



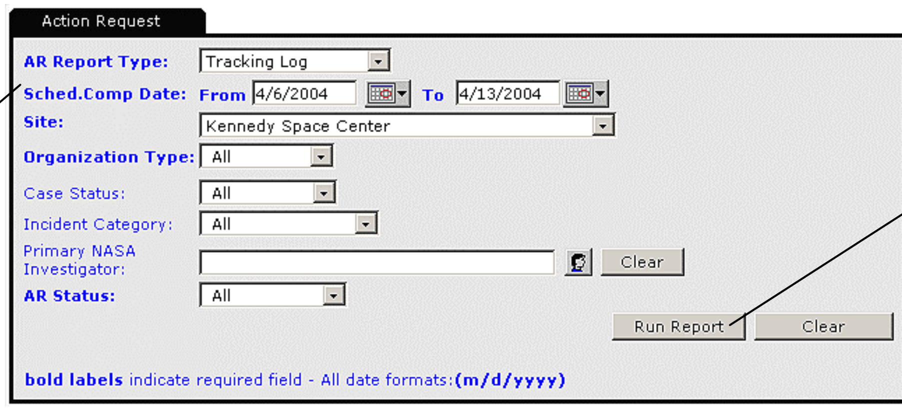
3. This report will display in separate viewing window.

Notes

Action Request Tracking Log

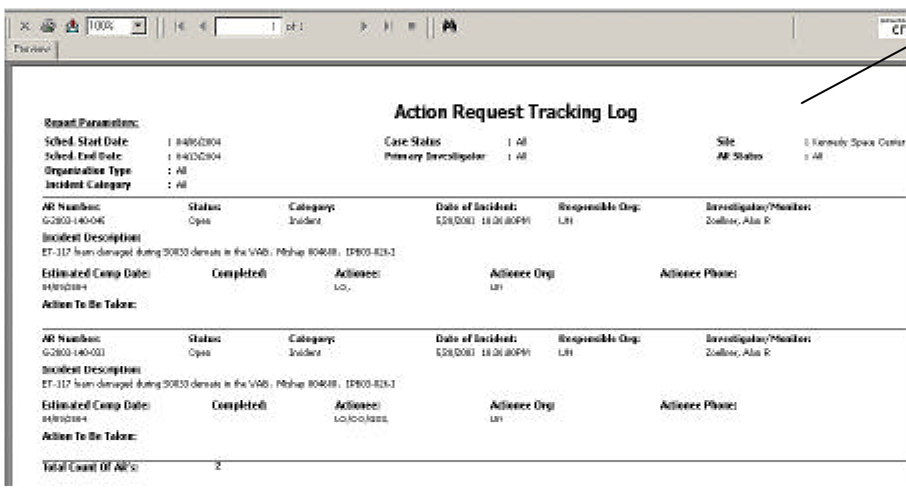
The “Action Request” find screen below actually runs two different reports the “Tracking Log” and the “Overdue Summary”. The “Tracking Log” shows all action requests including their details for a specified period of time and site. You may indicate a specific AR status, which allows you to filter this report to show only the type of AR you need such as competed, in progress or no response.

1. Complete as many fields as you want. Remember fields shown in bold blue are required.



2. Click the **Run Report** button.

3. This report will display in separate viewing window.

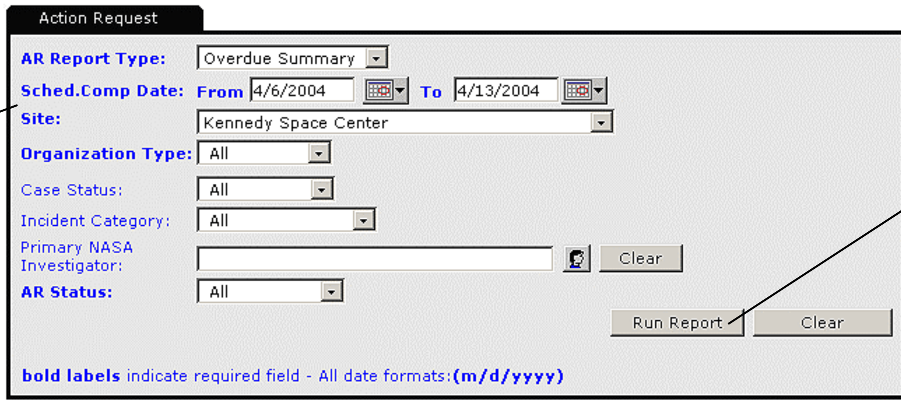


Notes

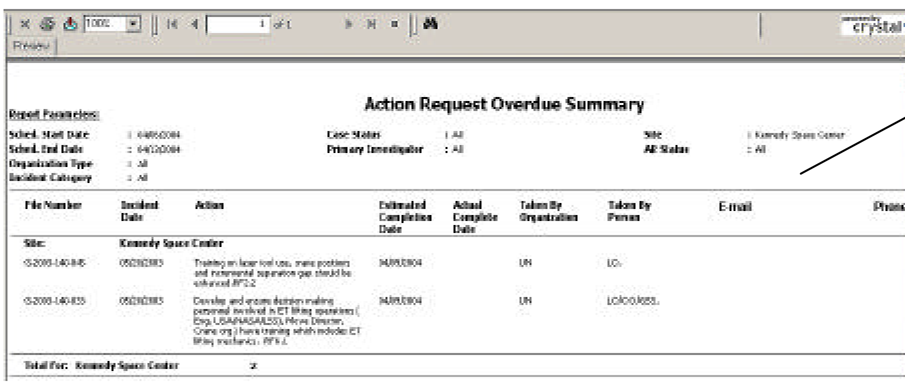
Action Request Overdue Summary

The "Overdue Summary" report is the second report that may be run using the Action Request find screen. This report lists all ARs currently overdue based on a specified date range and site. The report shows the AR's number as well as the "Action" required and the responsible person's name, email and phone number.

1. Complete as many fields as you want. Remember fields shown in bold blue are required.



2. Click the **Run Report** button.



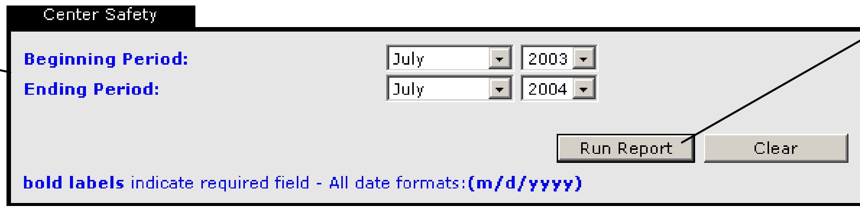
3. This report will display in separate viewing window.

Notes

Center Safety

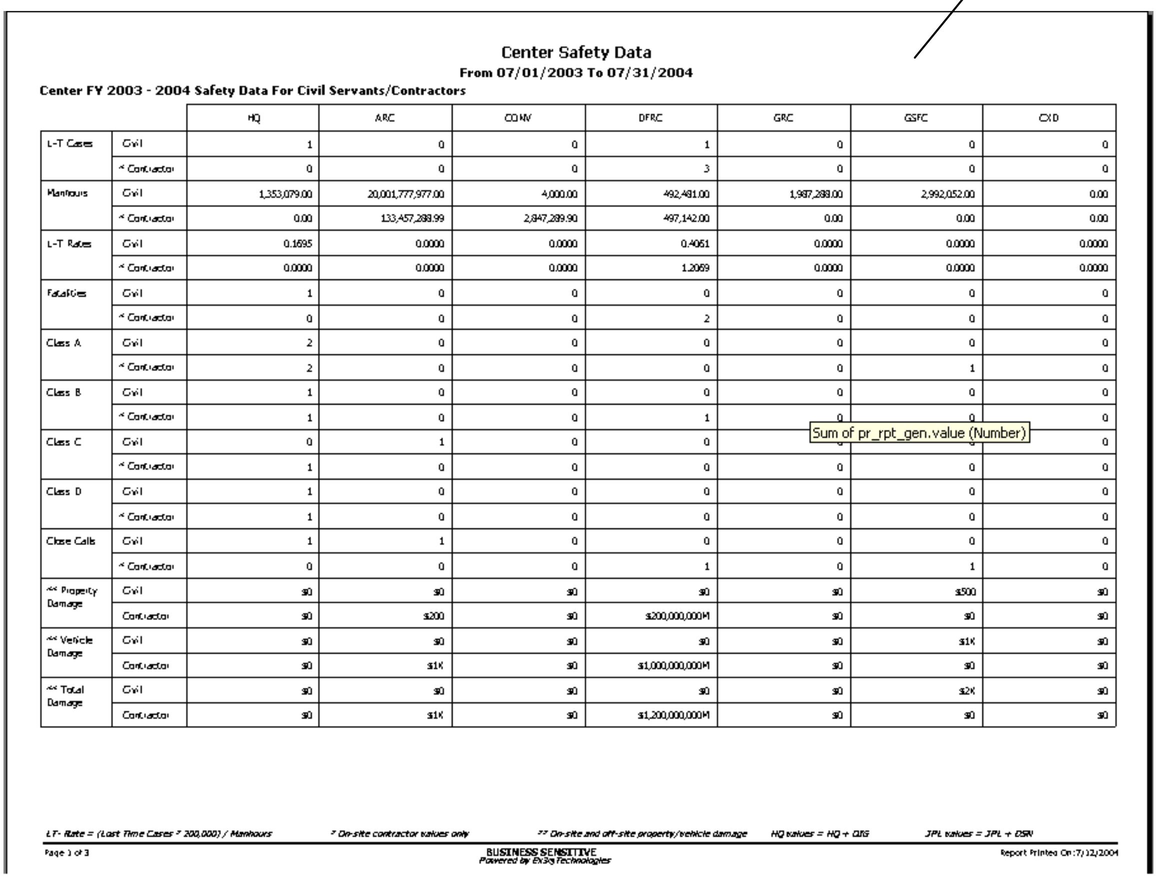
The Center Safety Report shows the total number of Lost-Time cases, Manhours, Fatalities, Class A, Class B, Class C, Class D, Close Calls, Property damages and Vehicle damages as well as the Lost-Time rates for each NASA center for a specified period of time. This report breaks down each center's totals into civil servant and contractor totals.

1. Complete all fields.



2. Click the **Run Report** button.

3. This report will display in separate viewing window.



Center Safety Data
From 07/01/2003 To 07/31/2004
Center FY 2003 - 2004 Safety Data For Civil Servants/Contractors

		HQ	ARC	CONV	DFRC	GRC	GSFC	CXD
L-T Cases	Civil	1	0	0	1	0	0	0
	* Contractor	0	0	0	3	0	0	0
Manhours	Civil	1,353,079.00	20,001,777,977.00	4,000.00	492,481.00	1,987,288.00	2,992,052.00	0.00
	* Contractor	0.00	133,457,288.99	2,847,289.90	497,142.00	0.00	0.00	0.00
L-T Rates	Civil	0.1695	0.0000	0.0000	0.4061	0.0000	0.0000	0.0000
	* Contractor	0.0000	0.0000	0.0000	1.2069	0.0000	0.0000	0.0000
Fatalities	Civil	1	0	0	0	0	0	0
	* Contractor	0	0	0	2	0	0	0
Class A	Civil	2	0	0	0	0	0	0
	* Contractor	2	0	0	0	0	1	0
Class B	Civil	1	0	0	0	0	0	0
	* Contractor	1	0	0	1	0	0	0
Class C	Civil	0	1	0	0	[illegible]	[illegible]	0
	* Contractor	1	0	0	0	0	0	0
Class D	Civil	1	0	0	0	0	0	0
	* Contractor	1	0	0	0	0	0	0
Close Calls	Civil	1	1	0	0	0	0	0
	* Contractor	0	0	0	1	0	1	0
** Property Damage	Civil	$0	$0	$0	$0	$0	$500	$0
	Contractor	$0	$200	$0	$200,000,000M	$0	$0	$0
** Vehicle Damage	Civil	$0	$0	$0	$0	$0	$1K	$0
	Contractor	$0	$1K	$0	$1,000,000,000M	$0	$0	$0
** Total Damage	Civil	$0	$0	$0	$0	$0	$2K	$0
	Contractor	$0	$1K	$0	$1,200,000,000M	$0	$0	$0

Sum of pr_rpt_gen.value (Number)

*LT- Rate = (Lost Time Cases * 200,000) / Manhours* ** On-site contractor values only* *** On-site and off-site property/vehicle damage* *HQ values = HQ + OIG* *JPL values = JPL + DSN*

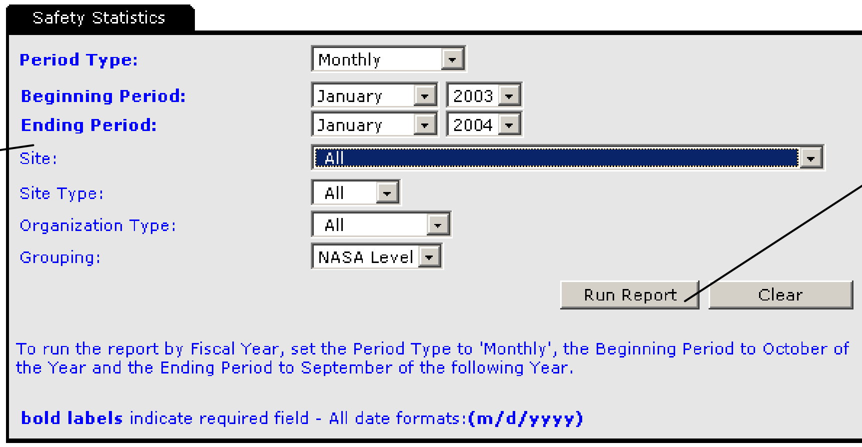
Page 1 of 3 **BUSINESS SENSITIVE** *Powered by Ex3g Technologies* Report Printed On:7/12/2004

Notes

Safety Statistics Report

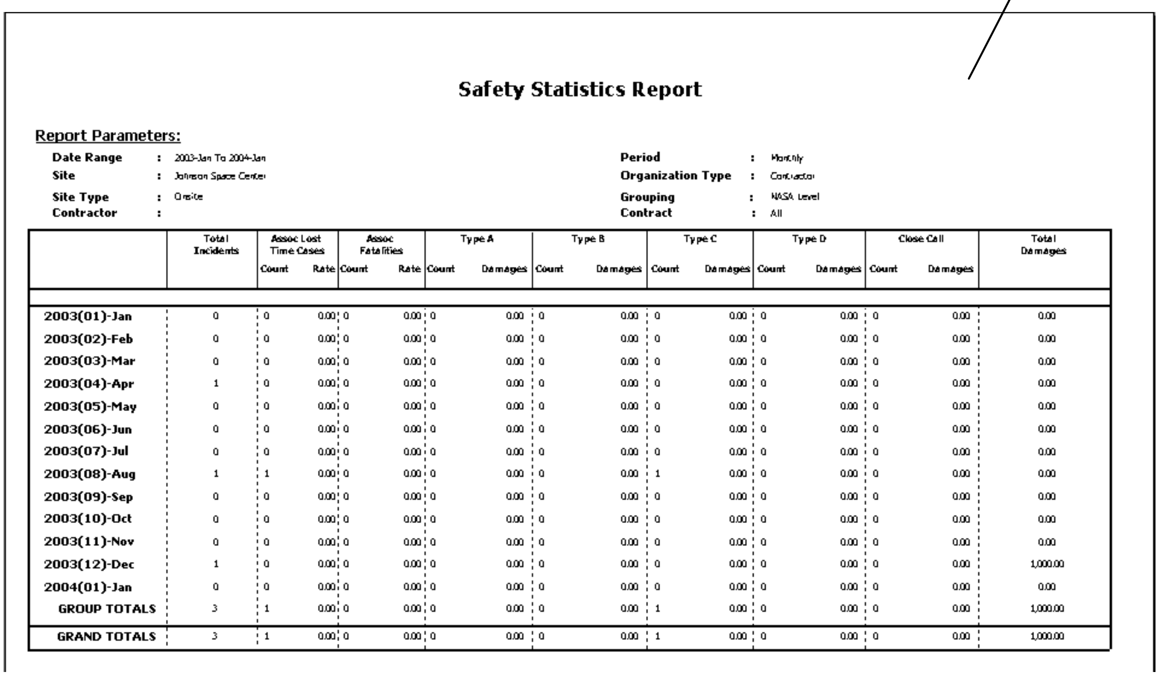
The Safety Statistics Report gives the total number of safety incidents that have occurred over a specified period of time at a specific site. The report breaks the total number of incidents down into each safety classification as well as associated Lost-Time case, fatalities and damages. This report allows you to run a very narrow report that includes a specific site, organization and grouping or a very broad report that encompasses all sites.

1. Complete as many fields as you want. Remember fields shown in bold blue are required.



2. Click the **Run Report** button.

3. This report will display in separate viewing window.



Safety Statistics Report

Report Parameters:

Date Range	:	2003-Jan To 2004-Jan	Period	:	Monthly
Site	:	Johnson Space Center	Organization Type	:	Contractor
Site Type	:	Onsite	Grouping	:	NASA Level
Contractor	:		Contract	:	All

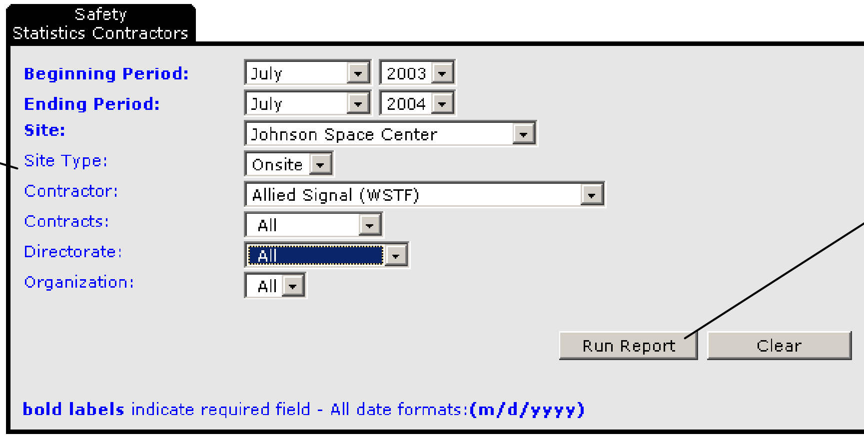
	Total Incidents	Assoc Lost Time Cases Count	Assoc Lost Time Cases Rate	Assoc Fatalities Count	Assoc Fatalities Rate	Type A Count	Type A Damages	Type B Count	Type B Damages	Type C Count	Type C Damages	Type D Count	Type D Damages	Close Call Count	Close Call Damages	Total Damages
2003(01)-Jan	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(02)-Feb	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(03)-Mar	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(04)-Apr	1	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(05)-May	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(06)-Jun	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(07)-Jul	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(08)-Aug	1	1	0.00	0	0.00	0	0.00	0	0.00	1	0.00	0	0.00	0	0.00	0.00
2003(09)-Sep	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(10)-Oct	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(11)-Nov	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
2003(12)-Dec	1	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1,000.00
2004(01)-Jan	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
GROUP TOTALS	3	1	0.00	0	0.00	0	0.00	0	0.00	1	0.00	0	0.00	0	0.00	1,000.00
GRAND TOTALS	3	1	0.00	0	0.00	0	0.00	0	0.00	1	0.00	0	0.00	0	0.00	1,000.00

Notes

Contractor Statistics Report

The Contractor Statistics Report contains the same information as the Safety Statistics report but show only the numbers for the specified Contractor.

1. Complete as many fields as you want. Remember fields shown in bold blue are required.


Safety Statistics Contractors

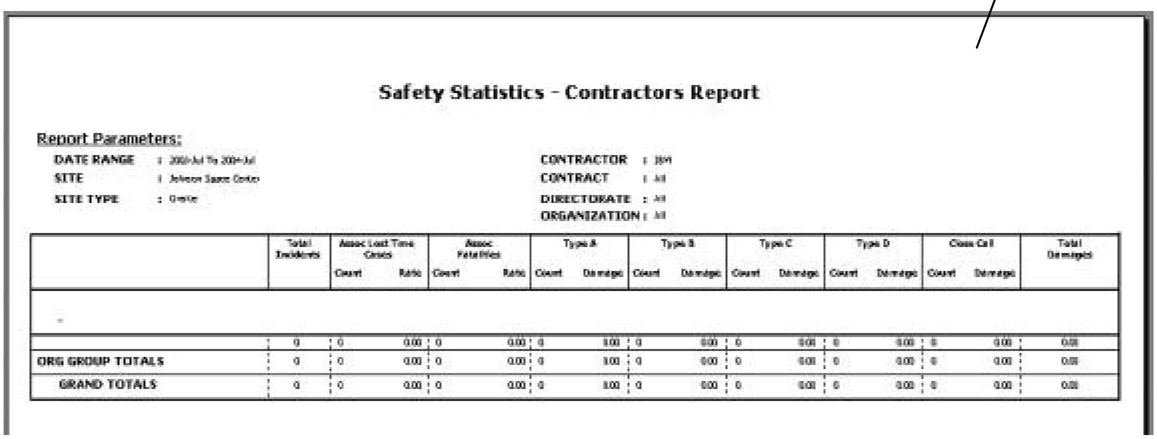
Beginning Period: July 2003
Ending Period: July 2004
Site: Johnson Space Center
Site Type: Onsite
Contractor: Allied Signal (WSTF)
Contracts: All
Directorate: All
Organization: All

Run Report Clear

bold labels indicate required field - All date formats:**(m/d/yyyy)**

2. Click the **Run Report** button.

3. This report will display in separate viewing window.


Safety Statistics - Contractors Report

Report Parameters:

DATE RANGE : 2003-Jul To 2004-Jul
SITE : Johnson Space Center
SITE TYPE : Onsite
CONTRACTOR : [illegible]
CONTRACT : All
DIRECTORATE : All
ORGANIZATION : All

	Total Incidents	Assoc Lost Time Cases		Assoc Fatalities		Type A		Type B		Type C		Type D		Close Call		Total Damage($)
		Count	Ratio	Count	Ratio	Count	Damage	Count	Damage	Count	Damage	Count	Damage	Count	Damage	
	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
ORG GROUP TOTALS	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00
GRAND TOTALS	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0.00

Notes

Exploring the Employee Module

- **Creating a New Employee Record**
- **Finding an Employee Record**

The Employee Module provides you with instant access to necessary personnel information. The employee records in the system are updated regularly with your Human Resource department to eliminate redundant data entry and ensure accuracy of records.

The following options display in the Employee menu:

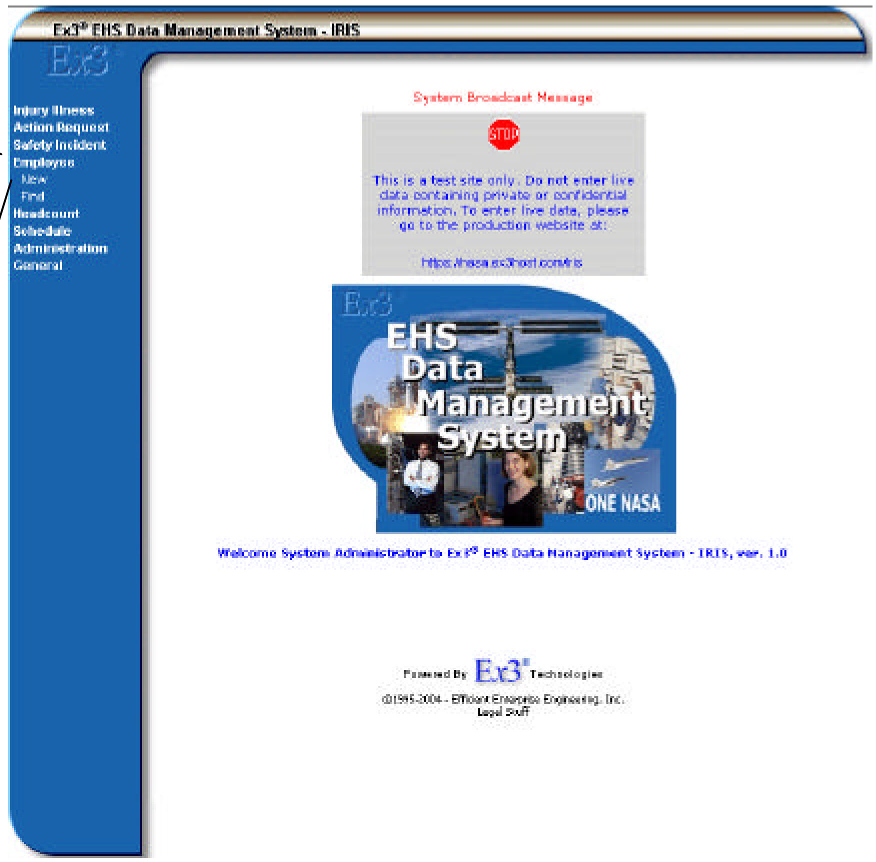
Creating a New Employee Record

If you have performed a search for an employee's record and cannot find it, you will need to create a new employee record. Creating a new record can be done quickly.

The diagram below outlines how to create a new employee record.

1. Click **Employee** on the menu bar to open the drop-down menu.

2. Click **New** under the Employee menu. The New Employee screen displays.

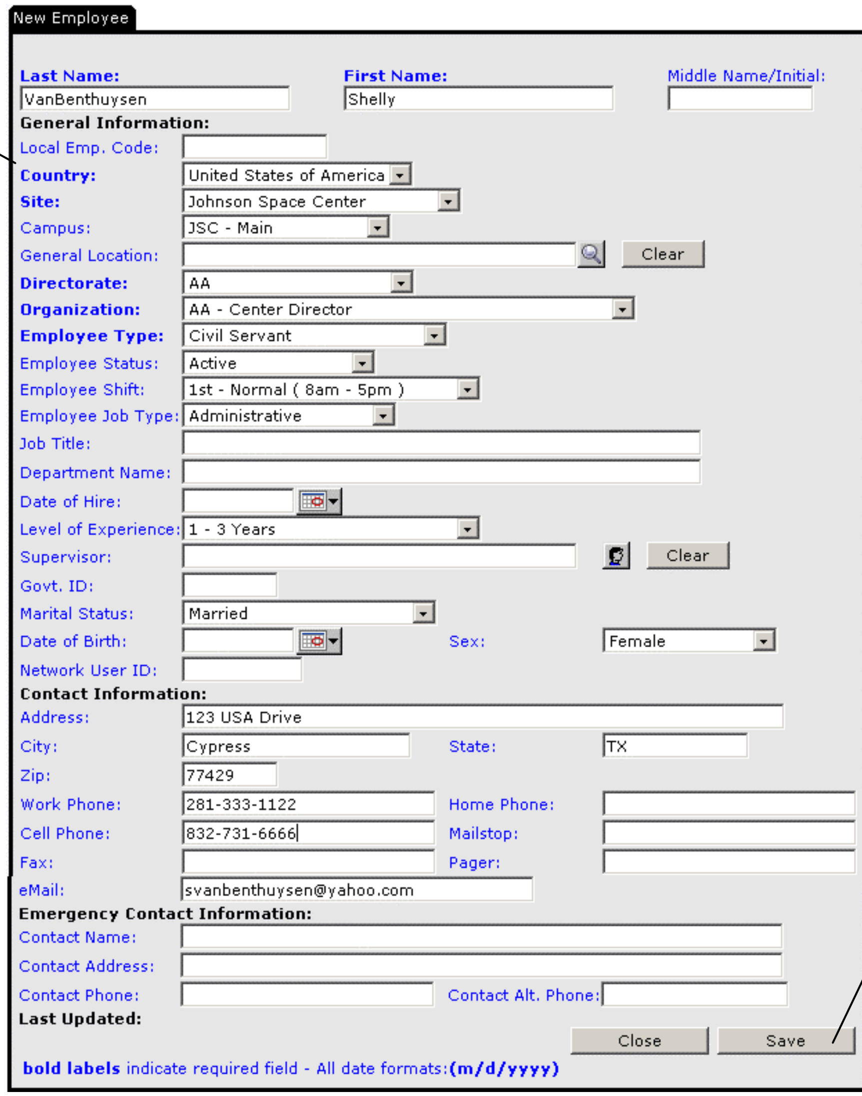


Notes

Creating a New Employee Record cont'd.

You may not have all of the information to complete all of the fields on the New Employee screen. Fill in as many fields as you can, remembering to complete all required fields shown in bold blue. Once the record is saved, you may add additional information at a later time.

1. Fill in as many fields as possible, making sure to complete all required fields.



2. Click the **Save** button.

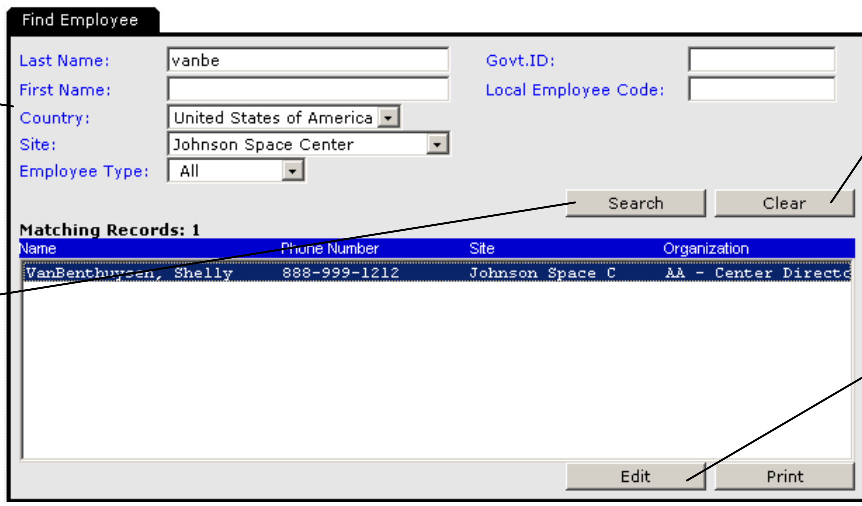
3. A verification pop-up displays stating the record was saved. Click **OK**.

Finding an Employee Record

Once an employee record is saved you may review, update or edit it by selecting the **Find** option on the Employee Module's menu. The Find Employee tab displays. Use this screen to search the entire database for the employee record you need. When you select a record, the Edit Employee tab displays.

1. Specify at least one search criterion.

2. Click the **Search** button. A list of matches displays in the Matching Records field.



If the appropriate employee is not listed, click the **Clear** button. Repeat step one with new data.

3. Select the appropriate employee from the list and click the **Edit** button.

Search Tips

- Capitalization doesn't matter.
- Complete words or numbers aren't necessary. Entering the first three characters is enough in most cases.
- Enter all the information you know to reduce the number of matches that fit your criteria.
- Remove some of the information you have entered if there are no matches.

Notes

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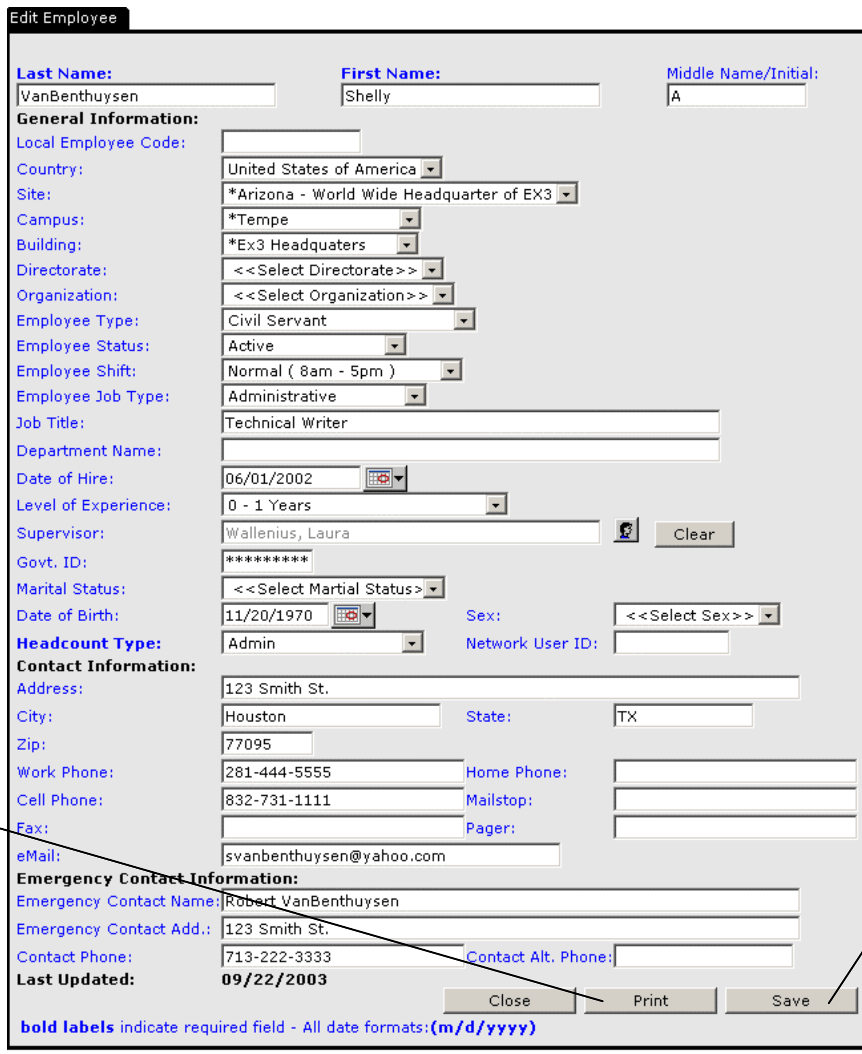
Finding an Employee Record, cont'd.

You may review or update an employee's record using this screen. Any modifications made will affect all future Injury/Illness incidents created with this record. They do not transfer to existing Injury/Illness cases. To change an employee's information within an injury/illness case you must use the Employee Tab within the case record.

For more information on using the employee tab within a case record see the EMPLOYEE TAB beginning on page 58.

Use the **Print** button to print a copy of the employee screen.



Remember to click the **Save** button if you make changes to this screen

Notes

Exploring the Headcount Module

- **Managing Headcount**

The Headcount Module allows contractors to update and maintain man-hours and attendant data easily and efficiently.

The following options display under the Headcount Module menu:

Managing Headcount

The Manage option on the Headcount Module's menu allows users to input civil servant and contractor manhours and other attendant data. The system can calculate recordable rates for injuries and illnesses as long as Headcounts are accurate.

The process for inputting headcount information is the same for both civil servants and contractors and is described below.

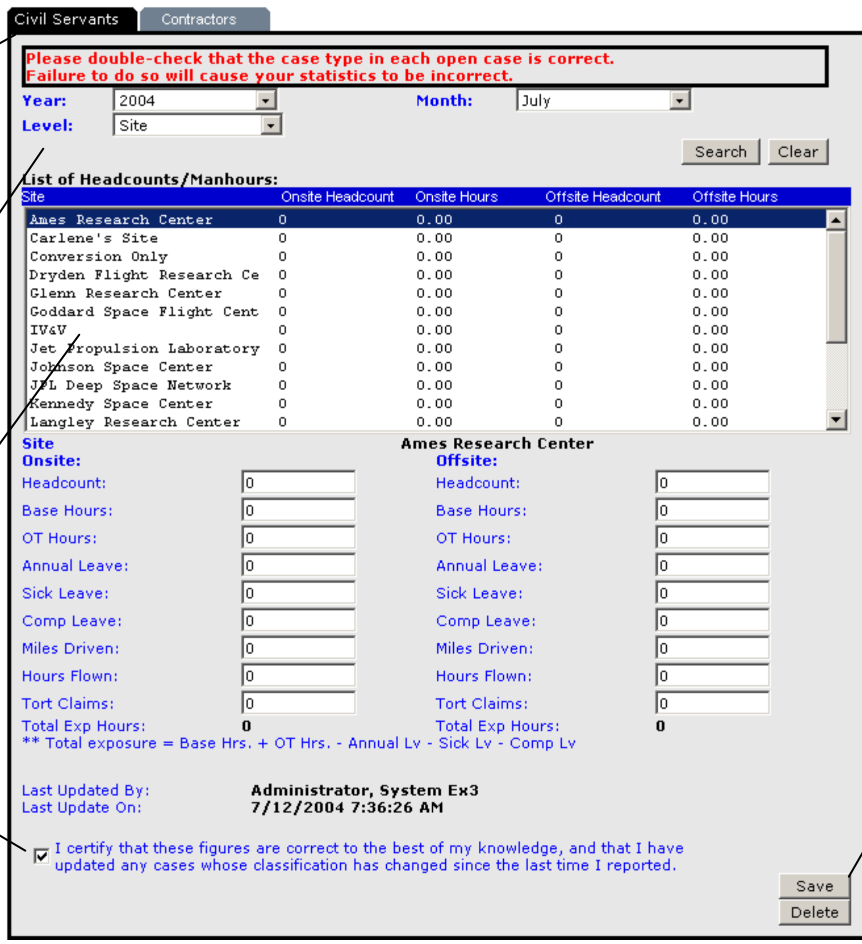
1. Click either the **Civil Servants** tab or the **Contractors** tab.

2. Complete all of the search criteria fields and click the **Search** button.

3. A list of possible matches displays. Highlight the appropriate organization and complete its onsite/offsite data fields.

4. The **Save** button will not display until this box is checked.

5. Click the **Save** button.



Notes

Exploring the Administration Module

The Administration Module allows system administrators to manage users, control application security and maintain application drop-down lists. You may only access this module if you have administrator rights on the system.

The following options display under the Administration menu:

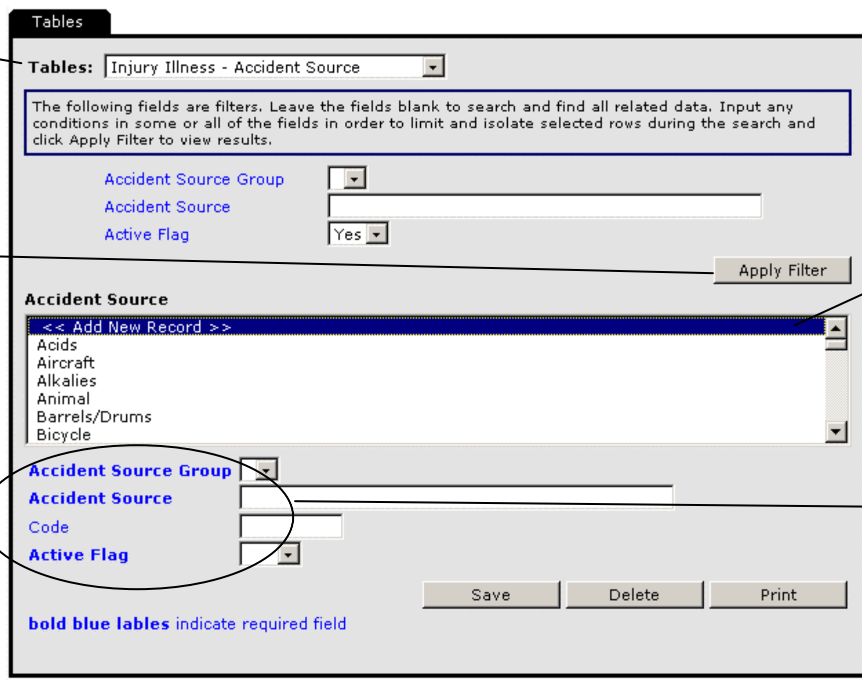
Maintaining Reference Tables

This tab allows administrators to review and maintain approved reference tables. This gives administrators the ability to add and remove options to drop down lists. For example, if a new building becomes available for use, it can be added to the system with this tab. Only those with appropriate roles can access this tab. The fields displayed are dependant on the table that has been chosen.

If you need to add over 100 new values to a reference table, please contact the Ex3 Administrator first. Reference tables with hundreds of values slow the application and makes drop-downs difficult to navigate. Ex3 has an alternate method for making these large numbers of values easily accessible to users.

1. Select the table you want to modify.

2. Use the filter option to limit or isolate select information within the table. Click the **Apply Filter** button to view results.



3. Highlight the record you want to edit or <<Add New Record>> to create a new record.

4. Complete these fields and click the **Save** button.

Notes

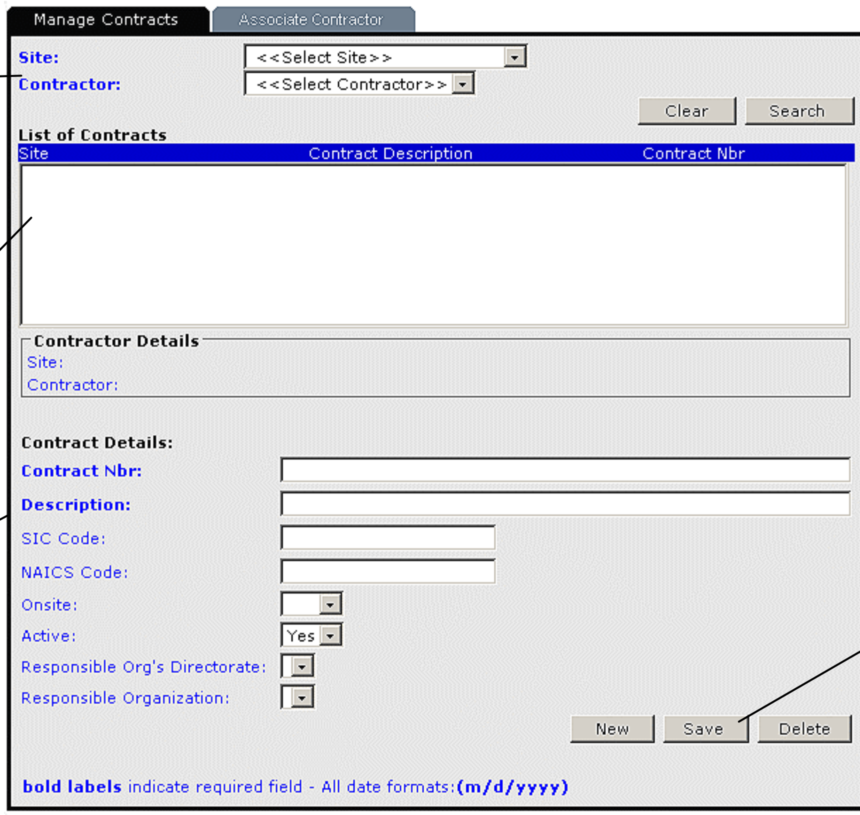
Managing Contracts

The Manage Contracts menu option contains two sub-tabs: Manage Contracts and Associate Contracts. The Manage Contracts tab allows administrators to update the lists of contractors, and their various contract numbers, that are currently employed at the various NASA sites. This information is used in the various modules within the system

1. Select the site and contractor you wish to view and click **Search**.

2. Highlight the record you want to edit or <**New Contract**> to create a new record.

3. Complete the Contract Details remembering to complete the required fields shown in bold blue.



4. Click the **Save** button.

Notes

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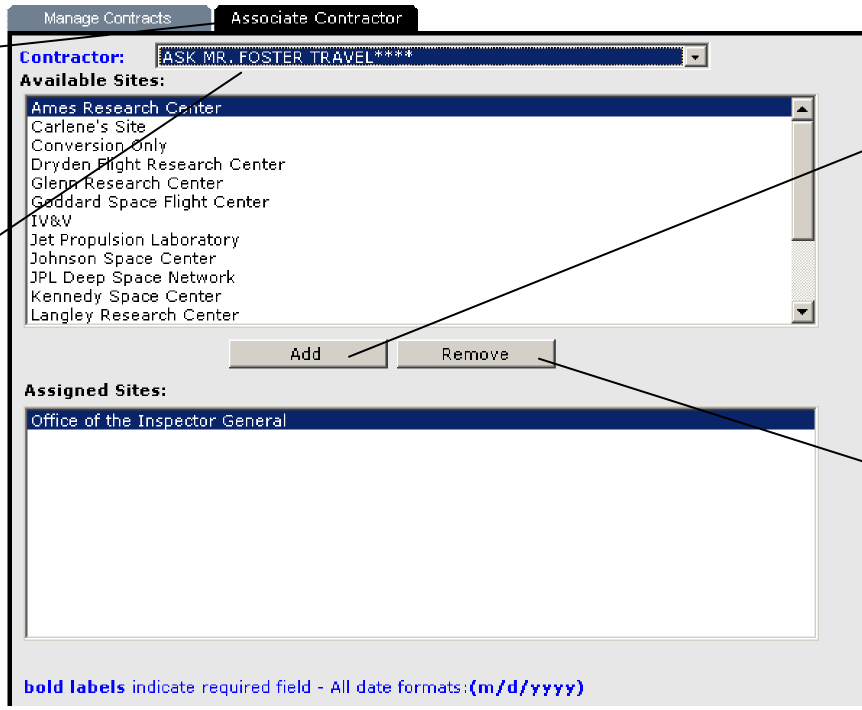
Associate Contractors

The Associate Contractor sub-tab allows administrators to associate contractors to one or more NASA sites.

1. Click on the **Associate Contractor** tab.

2. Select a contractor from the drop-down list.



3. Select the site you wish to associate with this contractor and click the **Add** button. The site will appear in the Assigned Sites list. Repeat until all sites for this contractor have assigned.

If you assigned a site in error or it is no longer necessary, simply highlight it on the Assigned Sites list and click the **Remove** button.

Notes

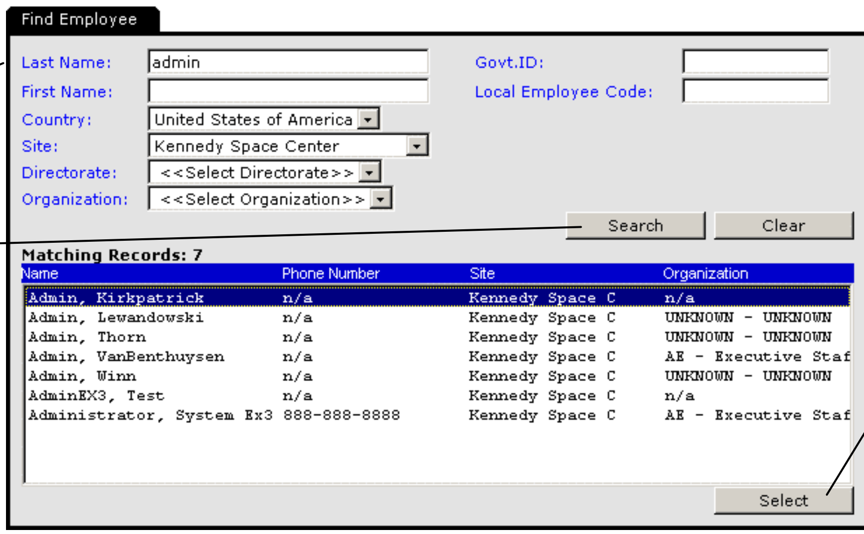
This tab allows administrators to set passwords and roles. The roles assigned here determine which fields, tabs and modules an employee can view. A user with a medical role, for example, would be able to view different information from a user with a Human Resources role.

Adding a New User

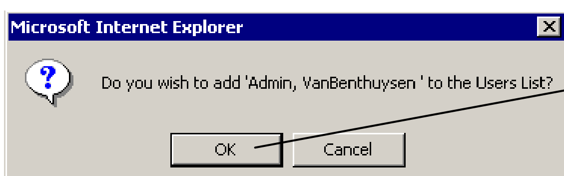
If an employee has not been assigned a role in the system they will need to be added to the user list before roles may be assigned. Adding a new user to the system is as follows. Select **New** from the Manage Users menu, the Find Employee screen displays. Highlight the employee you want to add and click **Select**. Once the employee is added to the user list, the User Information screen displays.

1. Specify at least one search criterion.

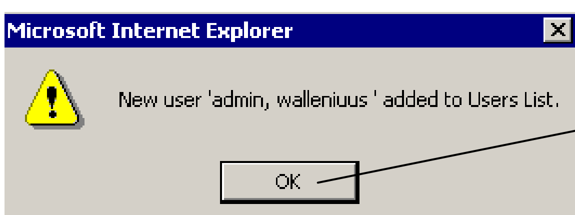
2. Click the **Search** button. A list of matches displays in the Matching Records field.



3. Select the appropriate employee from the list and click the **Select** button.



4. Click **OK** if you want to add this employee to the User's List

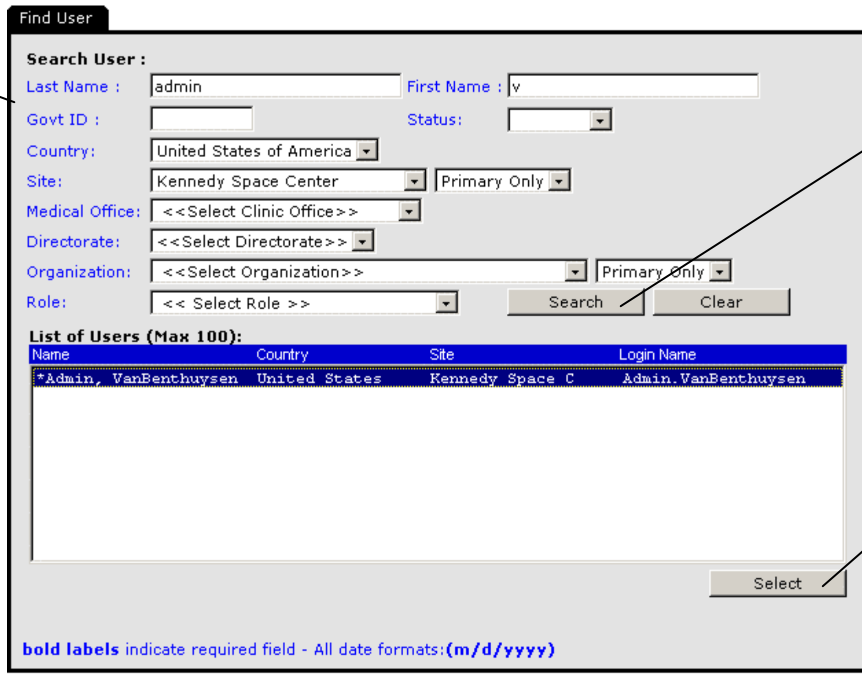


5. A pop-up box verifies that the employee was added to the Users List.

Finding Users

The Find User screen displays when **Find** is selected from the Manage Users menu. Use this screen to locate an existing user. Once a user is selected, the User Information screen displays.

1. Specify at least one search criterion.



2. Click the **Search** button. A list of matches displays in the Matching Records field.

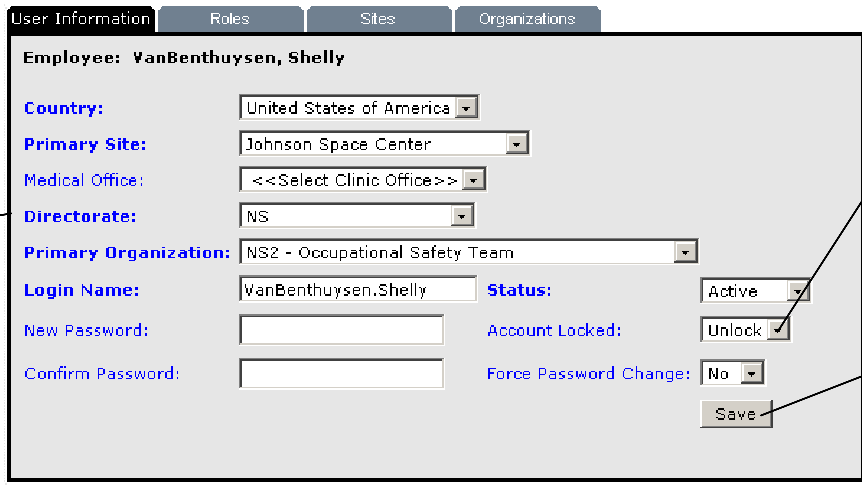
3. Select the appropriate employee from the list and click the **Select** button.

Notes

User Information Tab

The User Information tab records the user's basic information, such as login name, password and status. Administrators may also set a password or lock a user's account using this screen. The tabs to the right of the User Information tab provide additional information about the user.

1. Complete as many fields as possible. Remember fields shown in bold blue are required.



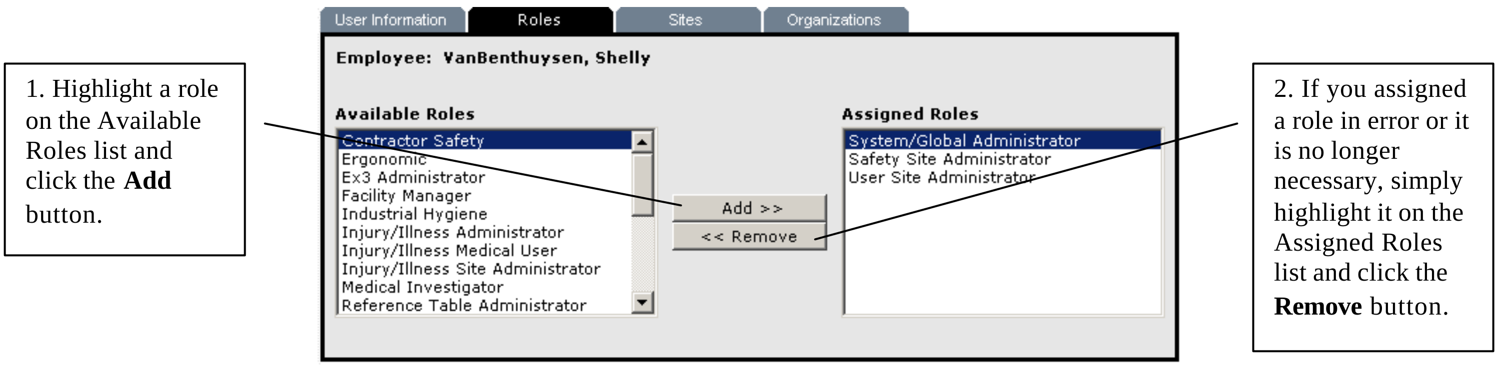
Use this field to lock a user's account. This prevents them from logging in to the system.

2. Click the **Save** button.

Notes

Roles Tab

In order for a user to have access to the full functionality of the system they must be assigned a role(s). This role determines which modules, tabs and fields they will be able to use or view. Since a user may have a variety of job responsibilities, they may need more than one role assigned to them. Changes to this screen save automatically.

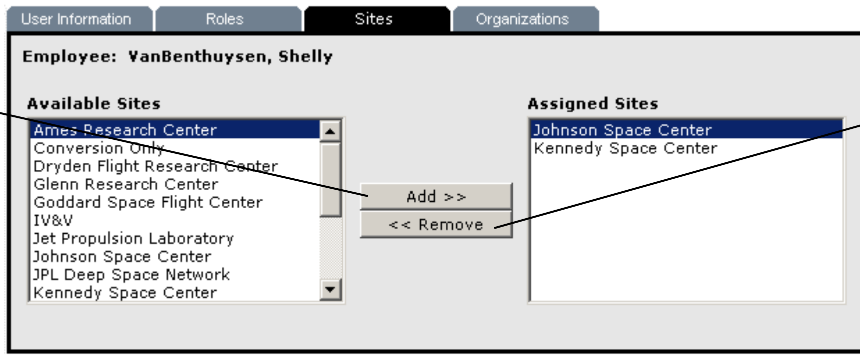


Notes

Sites Tab

A user's primary site is assigned using the User Information tab. However, it is possible for a user to work at more than one facility. These additional sites would be assigned using the Sites tab. Changes to this screen save automatically.

1. Highlight a site on the Available Sites list and click the **Add** button.



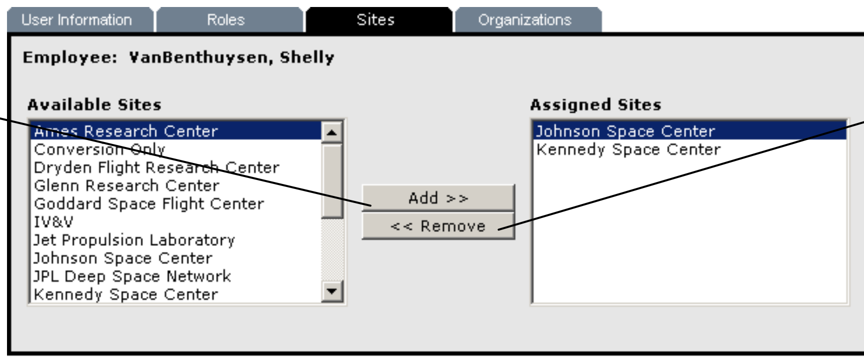
2. If you assigned a site in error or it is no longer necessary, simply highlight it on the Assigned Sites list and click the **Remove** button.

Notes

Organizations Tab

A user's primary organization is assigned using the User Information tab. However, like sites a user may work with a variety of organizations. These additional organizations would be assigned using the Organizations tab. Changes to this screen save automatically.

1. Highlight an organization on the Available Organizations list and click the **Add** button.



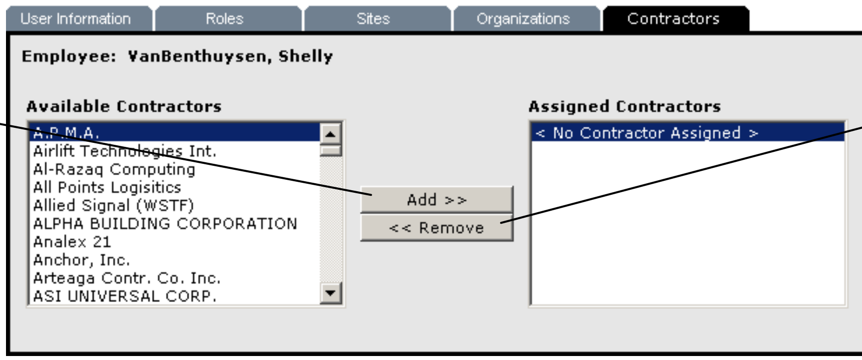
2. If you assigned an organization in error or it is no longer necessary, simply highlight it on the Assigned Organizations list and click the **Remove** button.

Notes

Contractors Tab

The Contractors tab will be visible only if the user is identified as a contractor. Every user, who is identified as contractor, must be assigned at least one contractor using this tab. Since contractor users are only allowed to view information in the system that pertains to their contractor it is important that all contractors for whom the user works are identified here. Changes to this screen save automatically.

1. Highlight a contractor on the Available Contractors list and click the **Add** button.



2. If you assigned a contractor in error or it is no longer necessary, simply highlight it on the Assigned Contractors list and click the **Remove** button.

Notes

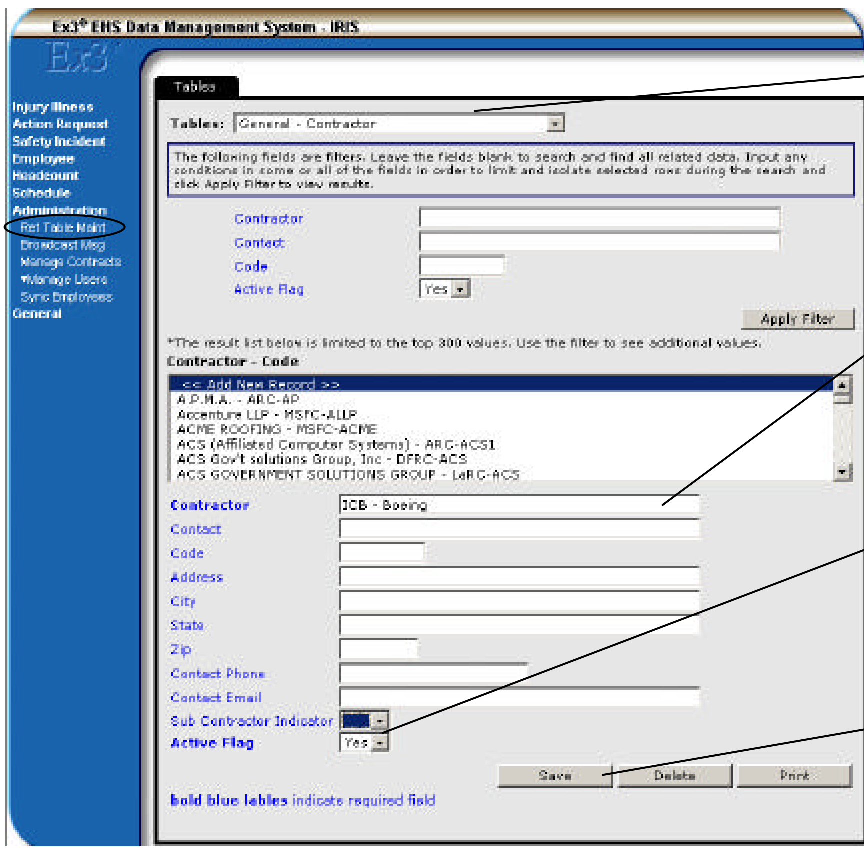
Managing Sub Contractors

It is possible that one sub-contractor would report to different prime contractors. In order to maintain data security a new contractor for each sub-contractor/primary contractor combination needs to be added and assigned to users. The following pages explain this process beginning with the creation of a new contractor using the "general - contractor" table on the reference maintenance screen.

Example: If ICB reports to both Boeing and USA, then add two contractors as follows:

- ICB - Boeing
- ICB - USA

1. Select **Reference Table Maintence** from the Administration Module's drop-down menu.



2. Select "General – Contractor" from the Tables list.

3. Add the new contractor name.

4. Change the Active Flag field to "Yes".

5. Click the **Save** button.

For more information on using the reference tables see MAINTAINING REFERENCE TABLES beginning of page 140.

Notes

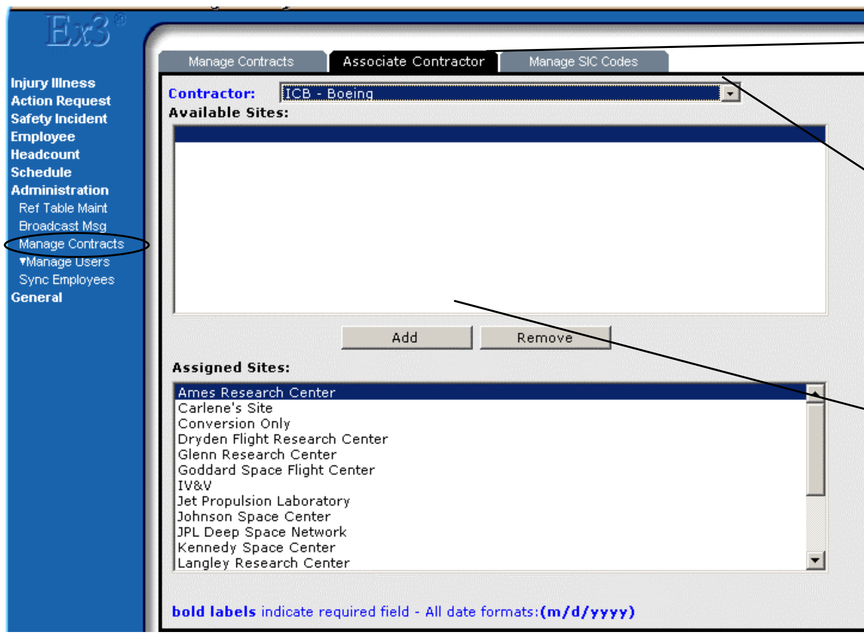
Managing Sub-Contractors cont'd.

After the contractors have been created you must identify where these contractors work by associating them to particular NASA sites.

Example:

- ICB-Boeing has people at Ames, Glenn and Goddard.
- ICB-USA has people at Ames, Johnson and White Sands.

6. Select **Manage Contracts** from the Administration Module's drop-down menu.



7. Click on the **Associate Contractor** tab.

8. Select the newly created contractor from the Contractor list.

9. Select one or more sites where the selected contractor works using the **Add** button.

For more information on using the Associate Contractors tab see ASSOCIATE CONTRACTORS beginning on page 142.

Notes

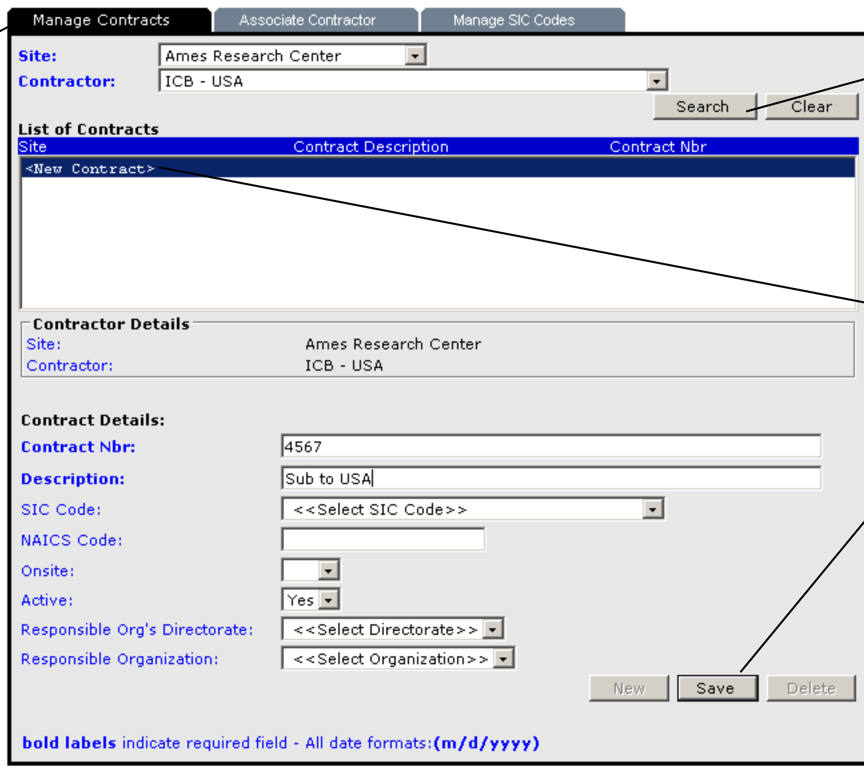
Managing Sub-Contractors cont'd.

Once the contractors have been associated to specific sites, add the appropriate contract number to each contractor using the Manage Contracts screen.

Example:

- ICB - Boeing Contract 1234
- ICB - USA Contract 5678

10. Click the **Manage Contracts** tab, which is located to the left of the **Associate Contractor** tab.



11. Select the site and contractor you have created and click the **Search** button.

12. Highlight **<New Contract>** or click the **New** button.

13. Complete <u>at least</u> the required fields and click the **Save** button.

For more information using the Manage Contracts tab see MANAGING CONTRACTS beginning on page 141.

Notes

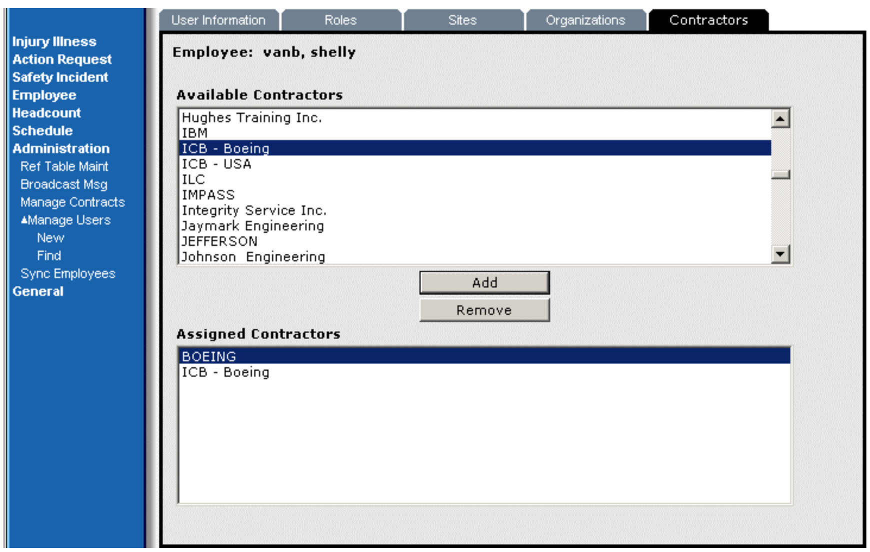
Managing Sub-Contractors cont'd.

Finally, assign access rights to these contractors using the **Manage Users** menu option from the Administration Module's drop-down menu.

Example:

- The employee Shelly Vanb, a Boeing employee, would be assigned to the Boeing Contractor and the new ICB – Boeing contractor.
- ICB users would be assigned to the ICB, ICB – Boeing, and ICB – USA Contractors.

This method prevents the primary contractor from having access to their sub-contractor's records with other primary contractors.



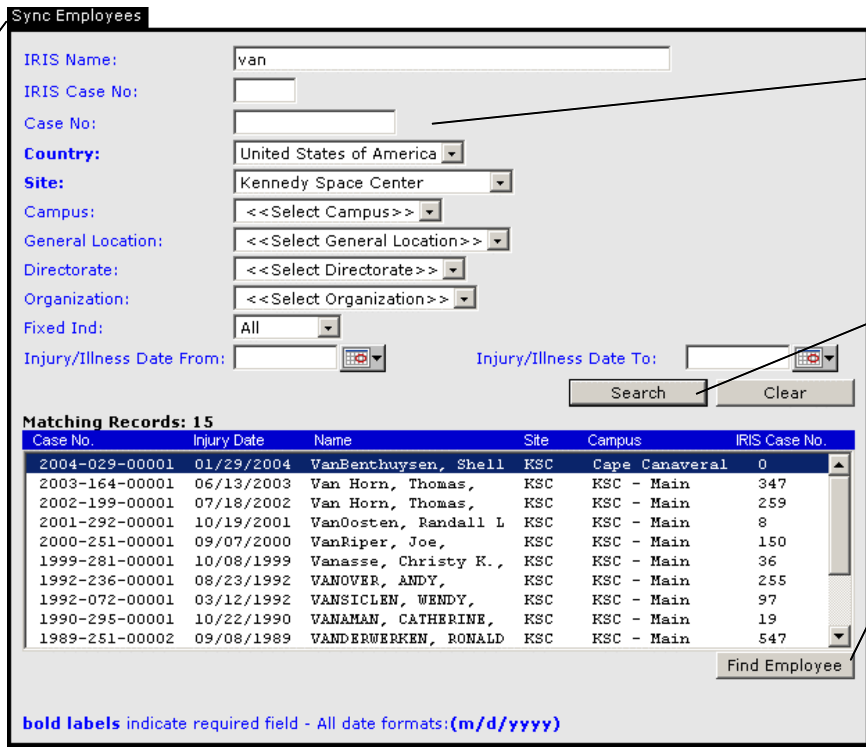
For more information on how to assign users to a specific contractor (s) see using the CONTRACTORS TAB beginning on page 149.

Notes

Sync Employees

The Sync Employees menu option allows administrators to match orphaned legacy records with current employees. . Complete a search using the criteria fields. The matching records list allows for multi-selecting. Once you have selected all the records you want to sync to a current employee click the **Find Employee** button.

The "Sync Employees" tab displays when **Sync Employees** is chosen from the Administration module's drop down menu



1. Specify at least one search criterion. Remember fields shown in bold blue are required

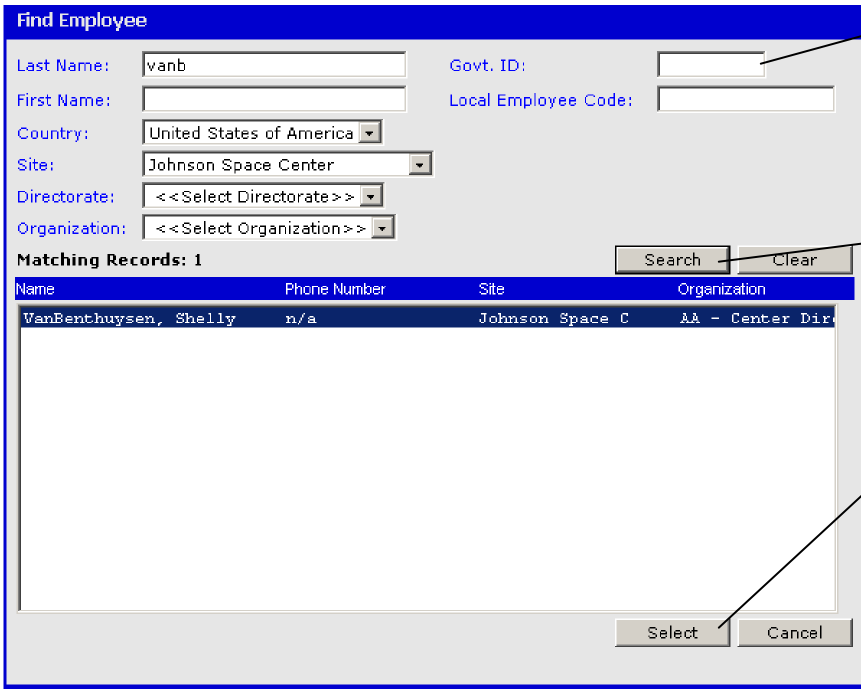
2. Click **Search**. A list of matching records displays at the bottom of the screen.

3. Select one or more case records to match to a current employee. Click **Find Employee**.

Notes

Sync Employees, cont'd.

The "Find Employee" screen displays after you click **Find Employee** on the Sync Employee screen. You use this screen to locate the current employee that matches your selected cases.



4. Specify at least one search criterion.

5. Click **Search**. A list of matching records displays at the bottom of the screen.

6. Highlight the correct employee and click **Select**.

7. A pop-up displays. Click **OK** to update the employee(s) cases.

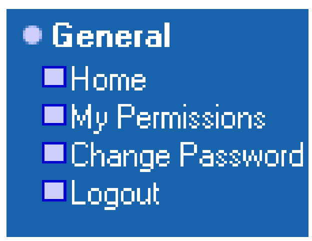
Notes

Exploring the General Menu

- **Accessing the Home Page**
- **Viewing My Permissions**
- **Changing Your Password**

The General Menu provides users with the ability to quickly change passwords, return to the homepage or logout of the system. The use of a logout procedure as well as changes to passwords helps improve the security of the system.

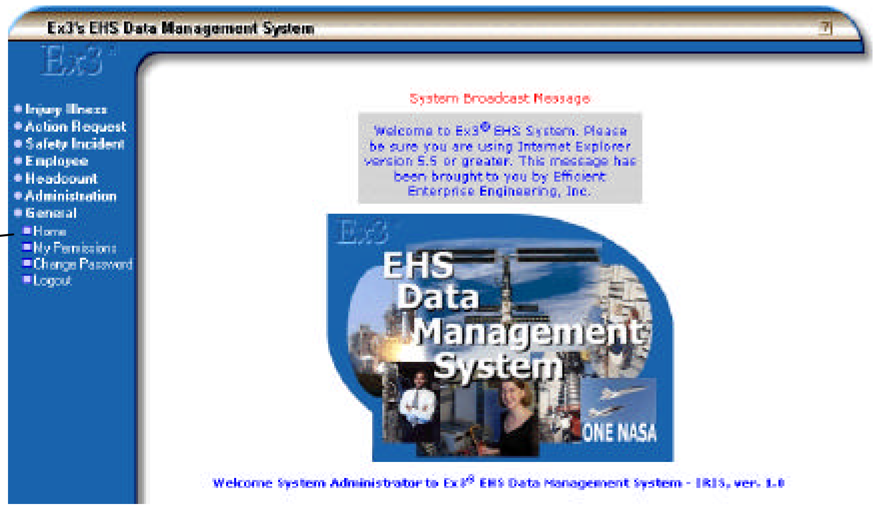
The following options display under the General menu:



Accessing the Home Page

Occasionally, you may want to close an open module without logging out of the system. To do this simply, select the **Home** option from the General Module's menu. The homepage displays.

Click the **Home** option on the General Module's menu. The System homepage will display.

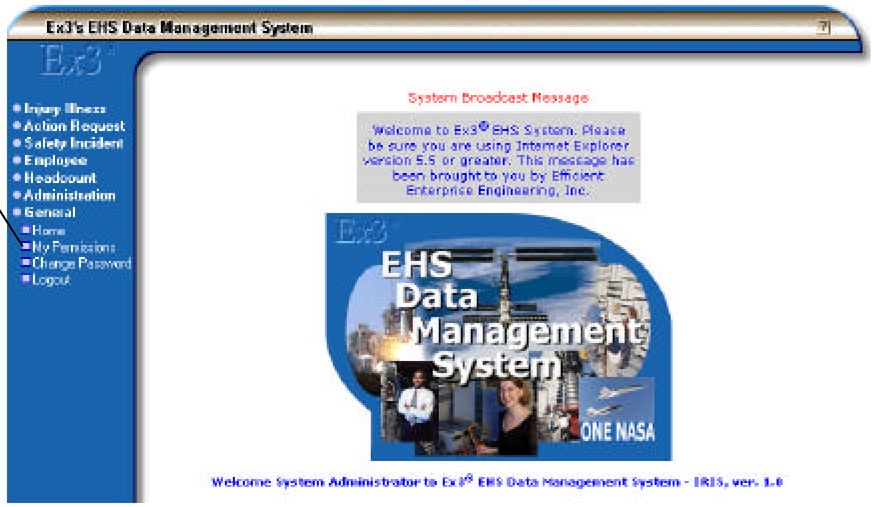


Notes

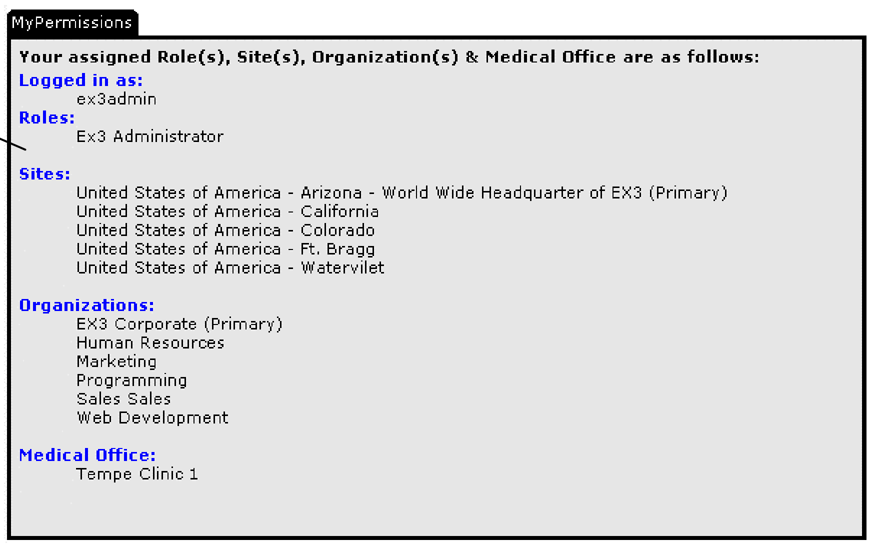
Viewing My Permissions

The My Permissions tab shows your user name, system roles, assigned sites, organizations and medical office. This information is very useful if you should ever need technical support while using the system.

Click **My Permissions** on the General Module's menu. The My Permissions tab will display.



All fields on the My Permissions tab are read only.



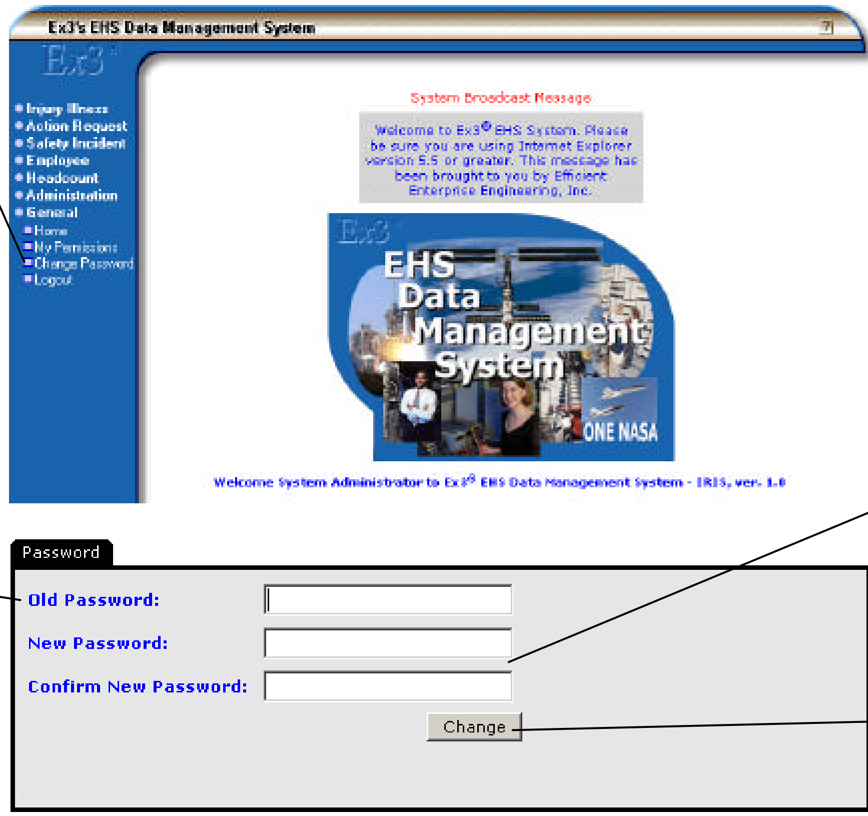
Notes

Changing Your Password

For security purposes, you may be required to change your system password on a regular basis. Changing your password is quick and easy.

1. Click **Change Password** on the General Module's menu. The Password tab will display.

2. Enter your current password in the Old Password field.



3. Enter your new password in the New Password and Confirm New Password fields.

4. Click the Change button. A message displays confirming that the change was successful.

New Password Requirements

- Passwords must contain at least one lowercase letter.
- Passwords must contain at least one uppercase letter.
- Passwords must contain at least one number.
- Passwords must contain one of the following characters: ~, !, @, #, %, &, _, <, >
- Passwords must be between 8 and 25 characters.

Notes

Appendix

- **NASA EHSDMS Security Matrix**

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NASA EHSDMS Security Matrix

LEGEND	
CODE	**Access Rights**
R	Read only - Cannot create, modify or delete
U	Delete, Create & Update
BLANK	No Access

	Global Roles										Site Roles													
	Ex3 Admin	System/Global Admin	Ref Table Admin	User Administrator	Report Viewer	Global Med.	Global Safety	Ref table Site Admin	User Site Admin	Inj/Ill Site Admin	Safety Site Admin	Inj/Ill Medical User	Safety User	Supervisor	Facility Manager	Contractor Safety	Workers Comp	Workers Comp Ltd	Industrial Hygiene	Ergonomic	Schedule User			
Injury/Illness																								
Find Employee	R	R				R				R		R					R							
General – New Case	U	U								U		U					U							
Find Case	R	R				R	R			R	R	R	R	R	R	R	R	R	R	R				
General – Existing Case	U	U				R				U	R	U	R	R	R	U	U	R	R	R				
Change of Classification Window	U	U				X				U		U				R	U	X						
Find Case (New Visit)	R	R				R				R		R												
Find Visit	R	R				R				R		R												
Visit – Information	U	U				R				U		U					U	R						
Visit – Diagnoses	U	U				R				D		U												
Visit – Notes	U	U				R				U		U												
Visit – Treatments	U	U				R				D		U												
Visit – Vitals	U	U				R				U		U												
Body Parts	U	U				R				U		U					U	R						
Investigation – General	U	U				U	R				U		U		R	U	R		U	U				
Investigation – Details	U	U				U	R				U		U		R	U	R		U	U				
Investigation – Factors	U	U				U	R				U		U		R	U	R		U	U				
Investigation – Notes	U	U				U	R				U		U		R	U	R		U	U				
Investigation – OSHA	U	U				U	R				U		U		R	U	R		U	U				
Investigation – Actions	U	U				U	R				U		U		R	U	R		U	U				
Investigation – Conditions	U	U				U	R				U		U		R	U	R		U	U				
Investigation – Equipment	U	U				U	R				U		U		R	U	R		U	U				
Transition History	R	R					R			R	R	R	R		R	R	R	R						
Work Loss	U	U				R	R			U	R	U	R		R	U	U	U						
Employee	U	U				R	R			U	U	U	R		R	U	U	U						
Action Request	U	U				R	R			U	U	U	R	U	U	U	U	U	U	U				
Attachments	U	U				R	R			U	U	U	R		R	U	U	U						
Restrictions	U	U				R	R			U	R	U	R	R	R	R	R	R						
Job Placement	U	U				R	R			U	R	U	R	R	R	R	R	R						
Medical Leave	U	U				R	R			U	R	U	R	R	R	R	R	R						
Benefits	U	U															U	U						
My SIR	U	U												U	U	U								
Daily Log Report	R	R			R					R		R					R	R						
OSHA 300 Report	R	R			R					R		R					R	R						
OSHA 301 Report	R	R			R					R		R					R	R						
OSHA 200 Report	R	R			R					R		R					R	R						
OSHA 300A Report	R	R			R					R		R					R	R						
Work Loss Report	R	R			R					R		R					R	R						
Investigation Report	R	R				R				R		R		R	R		R	R	R	R				

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Case Visit Details Report	R	R			R					R		R					R	R						
Transition Report	R	R			R	R				R		R					R	R						
Paretos Report	R	R			R	R				R		R		R	R		R	R	R	R				
Indicators Report	R	R			R	R				R		R		R	R		R	R	R	R				
Fatality Details Report	R	R			R	R				R		R		R	R		R	R	R	R				
Fatality Summary Report	R	R			R	R				R		R		R	R		R	R	R	R				
Case Statistics	R	R			R	R				R		R		R	R		R	R	R	R				
Contractor Statistics	R	R			R	R				R		R		R	R		R	R	R	R				
Action Request																								
Create AR	U	U				U	U			U	U	U	U	U	U	U	U	U	U	U				
Manage AR	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U				
Distributions Lists	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U				
Search Criteria for ARs Window	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R				
Find eMail Distribution List Window	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R				
Find AR Owner Window	R	R	R	R	R	R	R			R	R	R	R	R	R	R	R	R	R	R				
Review Report	R	R			R	R	R			R	R	R	R	R	R	R								
Tracking Report	R	R			R	R	R			R	R	R	R	R	R	R								
Safety																								
General – New Incident	U	U					R				U		U			U								
Find Incident	R	R					R				R		R	R	R	R			R	R				
Global – Existing Incident	U	U					R				U		U	R	R	U			R	R				
Details – Factors	U	U					R				U		U	R	R	U			U	U				
Details – Category Specific	U	U					R				U		U	R	R	U			R	R				
Associations – Equipment	U	U					R				U		U	R	R	U			U	U				
Associations – Factors	U	U					R				U		U	R	R	U			U	U				
Associations – Witnesses	U						U																	
Investigator Notes	U	U					R				U		U	R	R	U			R	R				
Lessons Learned	U	U					R				U		U	R	R	R			R	R				
Action Request	U	U					U				U		U	U	U	U			U	U				
Attachments	U	U					R				U		U	U	U	U			U	U				
Mail	U	U					R				U		U		R	U			R	R				
Vehicle	U	U					R				U		U	U	R	U				R				
Property	U	U					R				U		U	U	R	U				R				
Investigators	U	U					R				U		U											
Injury/Illness	U	U				U	R			U	U	U	U											
Incident Log Report	R	R			R		R				R		R	R	R	R	R	R	R	R				
Paretos Report	R	R			R		R				R		R	R	R	R	R	R	R	R				
Indicators Report	R	R			R		R				R		R	R	R	R	R	R	R	R				
Detail Cause Report	R	R			R		R				R		R	R	R	R	R	R	R	R				
AR Reports	R	R			R		R				R		R	R	R	R	R	R	R	R				
Center Safety Report	R	R			R		R				R		R	R	R	R	R	R	R	R				
Damage Report	R	R			R		R				R		R	R	R	R	R	R	R	R				
Employee																								

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Find Employee	R	R								R	R	R	R	R		R	R	R						
Find Supervisor Window	R	R								R	R	R	R	R		R	R	R						
Find Employee Window	R	R								R	R	R	R	R		R	R	R						
Employee	U	U								U	U	U	U	U		U	U	U						
Headcount																								
Manage	U	U					R	U			U		U		U	U								
Administration																								
Manage Users	U	U		U					U															
Ref Table Maintenance	U	U	U					U																
Broadcast Message	U	U																						
Set Version	U																							
Required Fields	U																							
E3 Options	U																							
Manage Contracts	U	U	U	U			R	U	U		U		U		U	U								
Sync Employees	U	U		U					U															
Schedule																								
Schedule																					U			
General																								
Home	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R				
My Permissions	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R				
Change Password	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U	U				
Logout	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R			